Pleasure Travel Market to North America

MEXICO

U.S. DEPARTMENT OF COMMERCE
United States Travel
and Tourism Administration

PLEASURE TRAVEL MARKETS
TO NORTH AMERICA:
MEXICO

Parpared for:

UNITED STATES TRAVEL AND TOURISM ADMINISTRATION
TOURISM CANADA

By:

MARKET FACTS OF CANADA LIMITED

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INTRODUCTION

FOREWORD

In 1986 the U.S. Travel and Tourism Administration and Tourism Canada made an agreement to undertake jointly funded market research in overseas countries of mutual interest. The agreement will be in effect for five years and during its existence approximately four countries will be studied each year.

By combining resources the national tourism organizations of the two countries will be able to produce better market information than either could have done by working alone. As a result, agencies marketing Canada, the United States or both will be able to select their target markets with a good deal more precision than has been possible in the past. In addition, agencies responsible for developing the tourism products of both countries will have a clear idea of what their strengths and weaknesses are in the minds of the consumer. They would then be able to develop a better tourism product and one that will have a strong appeal to consumers in a variety of overseas countries.

The countries studied so far are:

1986	1987	1988
United Kingdom	Hong Kong	Italy
France	Singapore	Australia
West Germany	Switzerland	Brazil
Japan		Mexico

This report on the Mexican international travel market is one of the four that resulted from the 1988 studies. It is the intention of both Tourism Canada and the USTTA to make the results readily and widely available. The data are available in the following formats:

- The present main report

- A highlights report providing overviews of Italy, Australia, Brazil and Mexico

- Extensive computer cross-tabulations (see Methodology section for details)

- IBM compatible data diskettes in single punch format

A great deal of sophisticated travel market information has been made available through these studies. The challenge set forth by this work is to understand the information and to use it effectively. Officials of Tourism Canada and the USTTA are ready to help the tourism industry make the most effective use possible of the information.

OBJECTIVES

The objectives of this study are as follows:

1. To provide broad-based marketing information on the Mexican long haul pleasure travel market for strategic planning purposes

2. To identify and describe Mexican travel segments that are prime targets for travel to Canada and the United States for industry marketers

3. To describe elements of the travel product(s) required to meet the needs of the target travel market segments

4. To provide input to the development and placement of effective advertising and promotion to convert potential travel to actual travel to Canada and the U.S.

Accordingly the following research objectives were established:

1. To identify the basic long haul pleasure travel motivations, benefits and product/activity needs of Mexican travelers

2. To identify and describe the size, travel characteristics, attitudinal and awareness characteristics of this market

3. To identify levels of awareness and perception of the various U.S. and Canadian travel products

4. To identify the media habits of the long haul traveler

5. To profile the Mexican long haul pleasure travelers in terms of demographics, vacation style and lifestyle characteristics.

The main findings emerging from this study are the basis of this report.

STUDY METHODOLOGY

A total of 2,000 personal interviews were conducted with international travelers who met the following target qualifications:

- 18 years of age or over

- Took a vacation trip of four nights or longer by any mode of transportation outside Mexico in the past three years, or intended to take such a trip in the next two years

Personal in-home interviews were conducted in six different cities as follows:

	#
Mexico City	800
Guadalajara	300
Monterrey	300
Hermosillo	200
Merida	200
Juarez	200
Total	2,000

Households were screened by interviewers who followed pre-determined walk patterns from about 150 randomly selected starting points. Since much of the population was felt to have little or no chance of traveling on vacation outside of Mexico, interviewing was conducted only in neighbourhoods pre-identified as predominantly high (A and B) or middle (C) social class. In households with more than one qualified respondent a random selection was made using the next birthday method. The incidence of qualified respondents was determined by recording the results of these screening procedures.

Prior to fieldwork, a 60%/40% high/middle social class quota was established. Since it was not known whether this split represented the true make-up of travelers in the target market, the incidence of qualified respondents was monitored during fieldwork. The results indicated that the actual proportions were nearer 28/72 as follows:

Social class	Actual population	Incidence of qualified respondents	Estimated qualified respondents	
			#	%
High (A/B)	8,250,000	86%	7,100,000	28
Middle (C)	29,000,000	62%	18,000,000	72
		Total	25,100,000	

The social class quotas were therefore changed during fieldwork, but by the time the adjustments were implemented the best that could be achieved was a 40/60 split. The data were therefore weighted using a slightly conservative target of 30/70. At the same time, the data were weighted by sex since the 50/50 quota that was established was also not met. Full details of the weighting are therefore as follows:

Sex/social class		Actual interviews	Target interviews	Weight
Male	- A/B	374	300	0.8021
	- C	531	700	1.3183
Female	- A/B	417	300	0.7194
	- C	678	700	1.0324
	Total	2,000	2,000	

Fieldwork was conducted from October 3 to December 9, 1988. A copy of the questionnaire used is included in Appendix II.

Detailed computer cross-tabulations of all study results have been provided under separate cover. The banners provided include:

- By sex, age, and life cycle
- By type of trip, trip description, ever visited both Canada/U.S.
- By important items and income
- By destinations visited and destination most like to visit
- By ever visited/interest in visiting Canada/U.S.
- By modes of transportation used to and within Canada/U.S. and city
- By provinces in Canada interested in visiting
- By miscellaneous destinations in Canada interested in visiting
- By U.S. states interested in visiting
- By U.S. census regions interested in visiting
- By U.S. tourism regions interested in visiting
- By travel philosophy, benefit and product segments
- By miscellaneous destinations in U.S. interested in visiting

A table showing 95% statistical confidence limits for various base sizes is included in Appendix IV. In general, any results based on a sample of less than 100 respondents should be viewed with some caution.

A map of Mexico is included in Appendix VI.

MAIN FINDINGS

1.1 MARKET OVERVIEW

The population of Mexico in 1988 was approximately 82,750,000 people. The population is quite young with about 50% being under 18 years of age. In 1980, about two-thirds of the population lived in urban areas, and this proportion has likely increased since that time.

Mexico City is one of the largest cities, if not the largest city, in the world. It has a population of nearly 20,000,000 people, and it is by far the largest city in Mexico, although there are also four other cities with populations of 1,000,000 or over.

City	1988 population
Mexico City	19,947,000
Guadalajara	2,688,000
Monterrey	2,416,000
Puebla	1,292,000
Leon	1,017,000

Due to the dominance of Mexico City, much of the population is concentrated in the central part of Mexico.

The Mexican economy has been relatively unstable in the past few years due to rising foreign debt and falling oil prices. It entered a recessive cycle in 1988 due to the anti-inflationary measures applied by the Economic Solidarity Treaty (Pacto de Solidaridad Economica). The measures adopted by the government included controls on prices, wages and interest rates, reductions in government spending, and fixed international exchange rates.

For the general population these measures meant that their salaries were practically frozen against constant price increases, resulting in a substantial loss of purchasing power. In terms of the national economy, the result was a recession since, as inflation eased, economic activity showed a decrease in the growth rate.

Some signs of stabilization started to appear in 1988, though. Inflation, which had been 8.7% per month (159% annually) in 1987, dropped to 3.9% per month (51% annually) in 1988. The foreign exchange rate, which increased from 915 to 2,227 Mexican pesos to the U.S. dollar during 1987, stabilized even more and finished 1988 at a rate of 2,297 to the dollar. The unemployment rate during 1988 was about 4%, although this rate was basically unchanged from the year before.

Contributing to the recent strength of the economy is the rise of "maquiladoras". These are assembly plants located mainly in the north of Mexico that use foreign parts and supplies and reexport to the United States. Most of these companies are American owned, but some are owned by Japanese, South Korean and European companies. With only 16% of the population, the six Mexican states that share the 2,000-mile border with the U.S. now generate about 22% of the country's gross national product. This trend of stronger economic growth can be expected to have an ongoing impact on travel, particularly on border traffic between Mexico and the United States.

1.2 MARKET SIZE

Before examining the actual survey results themselves, it is worthwhile examining the survey sample in the context of the overall Mexican population. The following points can be noted:

- The Mexican population 18 years of age or over is approximately 41,500,000 people

- The urban population 18 or over is approximately 27,500,000 people

- The urban population 18 or over in high or middle social class is approximately 12,375,000 people

- The incidence of the target population of international travelers* among this latter group is 67% or approximately 8,300,000 travelers

- Compared with the general population, the target market is wealthier and much better educated.

(Reference: Tables 1 and 2)

* Travelers 18 years of age or over who took a vacation trip of four nights or longer by any mode of transportation outside Mexico in the past three years, or intended to take such a trip in the next two years.

TABLE 1

TARGET MARKET

Mexican population 18 years or over	41,500,000*
Urban population 18 years or over	27,500,000*
Urban population 18 years or over in high or middle social class	12,375,000*
Incidence of target market	67%
Size of target market	8,300,000

* Instituto Nacional de Estadistica, Geografia e Informatica

TABLE 2

COMPARATIVE TARGET MARKET DEMOGRAPHICS

	Target market %	General population %
Age		
18 - 24 years	31	28
25 - 34 years	24	26
35 - 44 years	20	18
45 - 54 years	12	12
55 - 64 years	8	8
65 years or more	6	8
Education		
Elementary school	6	73
Junior high school	7	11
Technical/commercial	15	5
Senior high school	22	4
University	50	7
Annual household income (in pesos)		
11,000,000 or less	26	33
11,000,001 - 17,000,000	21	25
17,000,001 - 25,000,000	20	23
Over 25,000,000	25	11
Refused	9	9

2.   PAST TRIP BEHAVIOUR - 4 NIGHTS OR MORE

This section of the report examines the number and characteristics of recent trips of four nights or longer made by Mexican travelers in the target market.

2.1   Number of pleasure trips in past 3 years

The very strong travel orientation of the sample was reflected in the fact that 94% of respondents had taken a pleasure trip of at least four nights in the past three years.

(Reference: Table 3A)

Of the respondents who had taken a pleasure trip of four nights or more, the majority (93%) had taken more than one trip, with a mean of 8.0 pleasure trips of four nights or more.

(Reference: Table 3B)

TABLE 3A

PLEASURE TRIPS 4 NIGHTS
OR MORE IN PAST 3 YEARS

	By any mode of transportation
Total respondents (100%)	2000
	%
Yes	94
No	6

TABLE 3B

NUMBER OF PLEASURE TRIPS 4 NIGHTS
OR MORE TAKEN IN PAST 3 YEARS

	By any mode of transportation
Total respondents who took a trip (100%)	1880
	%
1	7
2	9
3	13
4	11 } 93
5 - 6	18
7 or more	42
Mean	8.0

Pleasure trips were defined as either short haul (i.e. to places in Central America or the U.S. border states of Southern California, Texas, Arizona and New Mexico) or as long haul (i.e. to destinations elsewhere).

Of the respondents who had taken a pleasure trip of four nights or more in the past three years, 88% had traveled in Mexico, 3% had traveled to Central America and 58% had traveled to U.S. border states. A total of 38% had traveled elsewhere i.e. had taken a long haul trip.

(Reference: Table 4A)

Of the large number of respondents who took trips inside Mexico, 88% took more than one such trip, compared with 35% of the few respondents who took a trip to Central America.

More than one-half (56%) of the travelers to U.S. border states had taken more than one such trip in the past 3 years, with a mean of 3.1 such trips. The percentage of travelers taking more than one long haul trip to destinations elsewhere was somewhat less (44%), with a mean of 2.1 such trips.

(Reference: Table 4B)

TABLE 4A

WHERE TAKEN ANY PLEASURE TRIPS 4 NIGHTS
OR MORE IN PAST 3 YEARS

| | TO PLACES IN: | | | |
	Mexico	Central America	U.S. border states*	Else-where
Total respondents who took a trip (100%)	1880	1880	1880	1880
	%	%	%	%
Yes	88	3	58	38
No	12	97	42	62

TABLE 4B

NUMBER OF PLEASURE TRIPS 4 NIGHTS
OR MORE TAKEN IN PAST 3 YEARS

| | TO PLACES IN: | | | |
	Mexico	Central America	U.S. border states*	Else-where
Total respondents who took pleasure trips 4+ nights to that destination (100%)	1651	62	1098	709
	%	%	%	%
1	12	65	44	56
2	14 ⎤ 88	22 ⎤ 35	20 ⎤ 56	21 ⎤ 44
3 or more	74 ⎦	13 ⎦	36 ⎦	23 ⎦
Mean	6.1	1.9	3.1	2.1

* Southern California, Texas, Arizona and New Mexico

In other countries surveyed in this series of studies, the definition of long haul travelers included a requirement that they traveled by plane. In Mexico, the definition allowed for long haul travel by any mode of transportation. As it turned out, about all (92%) of the Mexican long haul travelers would have met the plane requirement as well.

(Reference: Table 4C)

The mean number of long haul trips by plane was 2.1, the same as for long haul trips by any mode of transportation (see Table 4B - Destinations elsewhere).

(Reference: Table 4D)

TABLE 4C

TAKEN ANY LONG HAUL TRIPS 4 NIGHTS
OR MORE IN PAST 3 YEARS BY PLANE

	Total
Total respondents who took a long haul trip (100%)	709
	%
Yes	92
No	8

TABLE 4D

NUMBER OF LONG HAUL TRIPS TAKEN
IN PAST 3 YEARS BY PLANE

	Total
Total respondents who took a long haul trip by plane (100%)	653
	%
1	58
2	20
3	11
4 or more	11
Mean	2.1

In the context of the total sample, then it can be seen that 72% of respondents had taken a pleasure trip of four nights or more outside Mexico in the past three years. This included 56% who had taken a short haul trip and 36% who had taken a long haul trip (19% had taken both). A total of 28% of respondents were therefore in the sample by virtue of the fact that they intended to take a trip outside Mexico in the next two years.

(Reference: Table 5)

TABLE 5

PLEASURE TRIPS 4 NIGHTS OR MORE IN THE PAST 3 YEARS OUTSIDE MEXICO

Total respondents (100%) 2,000

	%	
Short haul	56	
Long haul	36	72*
Neither	28	

*   Includes 19% who took both a short
        and a long haul trip in the past 3 years.

2.2   Destination of two most recent trips

Respondents who had traveled outside Mexico were asked to which destinations they had been on their most and second most recent pleasure trips in the past three years. The majority of trips taken by Mexicans were to the United States (86%), virtually all of which were to the mainland.

Within the United States, the most popular destinations (67%) were the border states of Southern California, Arizona, New Mexico and Texas. Only 3% of trips taken by Mexicans outside their own country were visits to Canada.

(Reference: Figure 1)

In terms of demographics, travelers to the U.S. border states were more likely than average to come from Monterrey, Hermosillo and Juarez, which is not surprising given the relative proximity of these cities to the U.S. Travelers to the border states also had comparatively lower levels of education and income.

Mexico City was by far the dominant source of travelers to destinations outside Canada and the U.S. These travelers were also better educated and more likely than average to live in a household without children.

Due to the low number of travelers to Canada, conclusions about their demographic profile should only be made with caution. The figures are included here for reference purposes only.

(Reference: Table 6)

FIGURE 1

DESTINATION OF TWO MOST RECENT TRIPS OUTSIDE MEXICO IN PAST 3 YEARS*
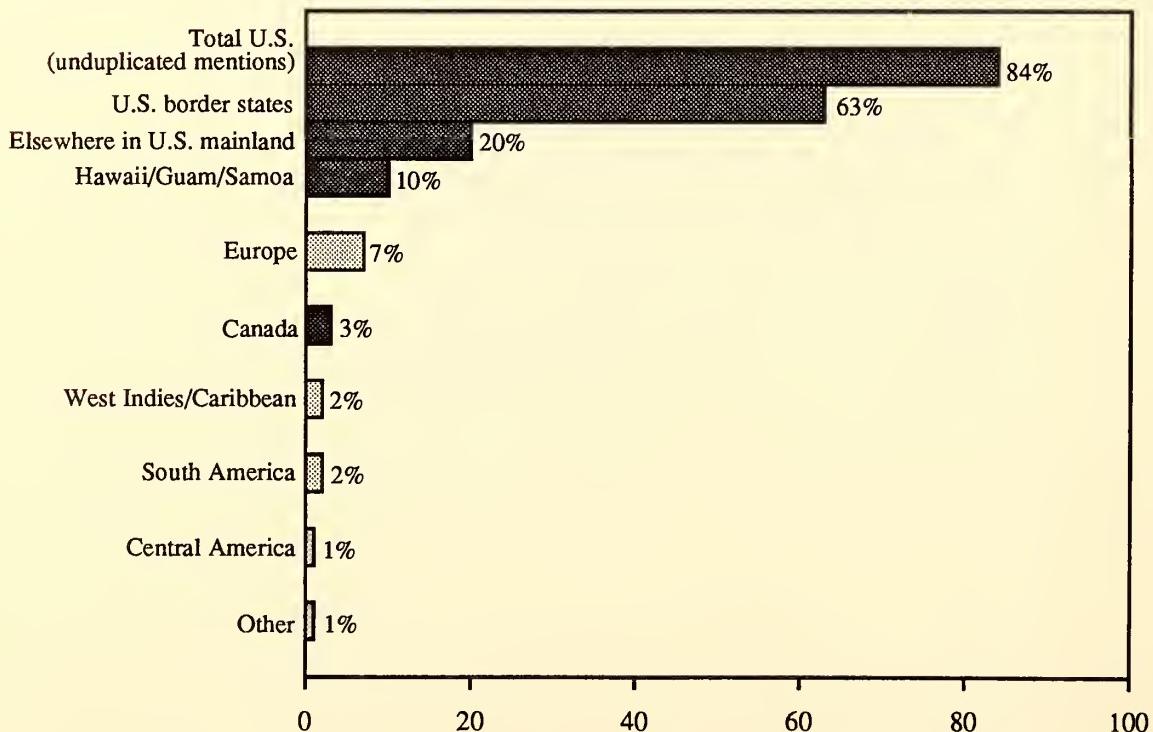
* Based on 2,333 trips comprised of 1,442 most recent trips and 892 second most recent trips.

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TABLE 6

DEMOGRAPHICS OF VISITORS TO KEY DESTINATIONS

		DESTINATION VISITED*				
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Total respondents (100%)	2000	40+	1250	719	524	180
	%	%	%	%	%	%
Sex						
Male	50	65	49	50	48	49
Female	50	35	51	50	52	51
Age						
18 - 24 years	31	33	33	34	33	24
25 - 34 years	24	14	23	24	22	27
35 - 44 years	20	17	19	18	20	17
45 - 54 years	12	15	12	11	13	14
55 - 64 years	8	20	7	7	7	9
65 years or over	6	2	6	6	5	9
Marital status						
Single	41	40	42	43	41	37
Married	55	50	53	52	55	56
Living together	**	-	**	-	**	**
Divorced/separated/widowed	2	5	2	2	1	2
Other	3	5	3	3	2	4
Occupation						
Owner	3	8	4	4	3	5
Manager/executive	11	10	12	11	12	10
Professional/technical	22	24	21	19	25	28
Clerical/sales	12	4	11	13	9	12
Skilled worker	4	-	4	5	3	2
Unskilled worker	1	-	**	**	1	1
Student	18	29	19	20	19	14
Retired	4	3	4	4	4	6
Housewife	24	20	24	25	23	22
Other	1	-	1	1	1	2
City						
Mexico City	40	(70)	36	30	46	(75)
Guadalajara	16	13	14	17	11	8
Monterrey	16	6	17	(22)	10	6
Hermosillo	9	4	12	(13)	10	3
Merida	9	6	9	4	16	8
Juarez	10	2	11	(14)	7	1

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

** Less than 0.5%

+ Note: Small base

Note: Circled numbers represent those referred to in the main text

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TABLE 6 (cont'd)

DEMOGRAPHICS OF VISITORS TO KEY DESTINATIONS

	Total	Canada Total	U.S. Total	U.S. Border states	U.S. Elsewhere on mainland	Other
Total respondents (100%)	2000	40+	1250	719	524	180
	%	%	%	%	%	%
Education						
Elementary school	6	2	7	⑩	2	3
Junior high school	7	8	7	8	6	4
Technical/commercial	15	8	14	15	12	14
Senior high school	22	28	22	21	23	15
University	50	54	51	46	58	㊴
Life cycle						
Living alone	2	6	2	2	2	3
Living with one adult	9	13	8	7	10	14
Single with children	23	21	24	26	22	18
Couple with children	42	37	42	41	42	32
Other	24	22	24	25	24	33
Living arrangement						
Live alone	2	6	2	2	2	3
Living with children (0-18)	66	62	67	68	65	49
Living without children (0-18)	32	32	31	30	33	㊽
Mean no. of adults 18 years or over	3.2	3.2	3.3	3.3	3.2	3.2
Whether any children under 18 years in household						
Yes	66	62	67	68	65	50
No	38	38	33	32	35	㊿
Household income in pesos (1987 financial year)						
11,000,000 or less	26	27	23	28	18	16
11,000,001 - 17,000,000	21	11	21	24	17	17
17,000,001 - 25,000,000	19	13	20	19	21	21
Over 25,000,000	25	31	27	21	34	38
Refused	9	18	9	8	10	8

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

' Note: Small base

Note: Circled numbers represent those referred to in the main text

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2.3   Type of two most recent trips

When asked what type of trip they had taken on their most and second most recent trips to any destination outside Mexico, the most frequent mentions given by respondents were touring trips (39%) and trips to visit friends and relatives (32%). The next most common type was a trip combining business and pleasure (13%). A variety of other trip types received relatively fewer mentions.

(Reference: Figure 2)

FIGURE 2

TYPE OF TWO MOST RECENT TRIPS OUTSIDE MEXICO*
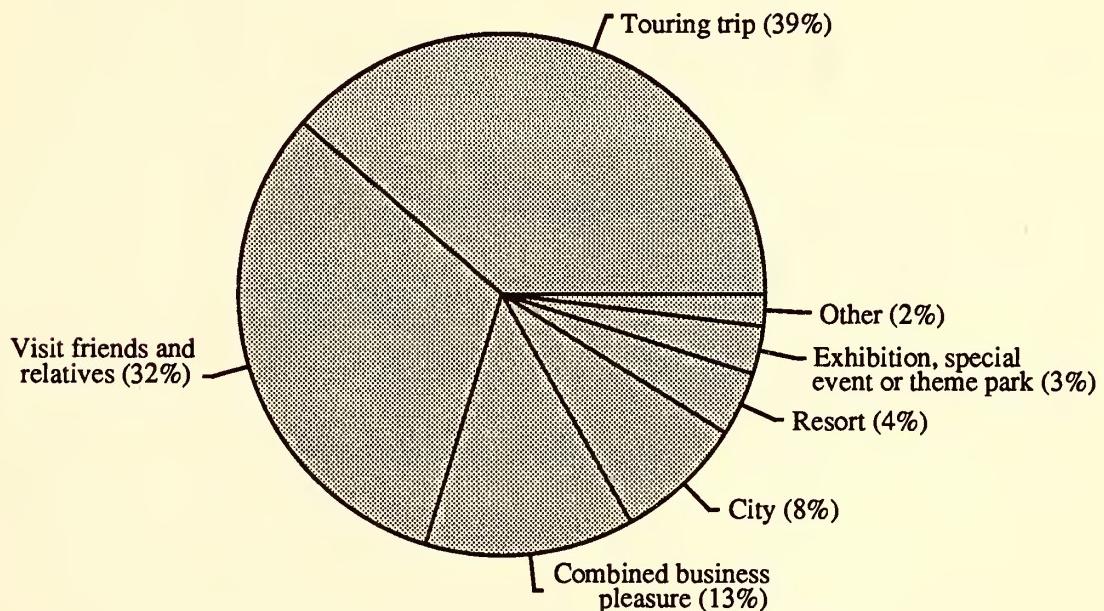
* Based on 2,333 trips comprised of 1,442 most recent trips and 892 second most recent trips.

Note: For full descriptions of the trip types discussed in this section see Card A in Appendix II.

Touring trips were the most frequent type of trip for all travelers except for those visiting U.S. border states. The latter group were more likely than other groups to take a trip to visit friends and relatives (43%). Meanwhile, touring trips were particularly popular among travelers to "other" destinations (52%).

(Reference: Table 7)

TABLE 7

TYPE OF TRIP OUTSIDE MEXICO**

| | Total | DESTINATION++ | | | | |
| | | Canada | U.S. | | | Other |
			Total	Border states	Elsewhere on mainland	
Total trips taken by respondents (100%)	2333	76+	2003	1091	900	303
	%	%	%	%	%	%
Touring trip	39	43	37	28	49	52
Visit friends and relatives	32	31	33	43	22	19
Combined business and pleasure	13	10	14	14	13	11
City	8	5	8	8	8	5
Resort	4	3	3	3	4	5
Exhibition, special event or theme park	3	4	3	3	3	4
Outdoor trip	1	4	1	1	1	-
Cruise	1	-	*	*	1	4

* Less than 0.5%

++ On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

+ Note: Small base

** Total most and second most recent trip

2.4 Mode of transportation used by travelers to Canada and the mainland U.S.

Respondents who had visited either Canada or the mainland U.S. were asked which mode of transportation they used to _enter_ the country on their trip, as well as which modes of transportation they used _within_ the country.

For Canada, plane (66%) was the most common mode of entry, with bus (18%) in second place. Relatively few entries were made by private car (11%).

For the U.S. the mode of entry varied depending on the destination. For border states, private car (55%) was the most common mode of entry, followed by plane (29%). Elsewhere on the mainland the reverse was true - 70% plane and 25% private car.

(Reference: Table 8A)

TABLE 8A

MODE OF TRANSPORTATION USED TO ENTER
CANADA AND MAINLAND U.S.**

	Canada	MAINLAND U.S.		
		Total	Border states	Elsewhere on mainland
Total trips taken by respondents (100%)	76+	1991	1091	900
	%	%	%	%
Plane	66	48	29	70
Private car	11	41	55	25
Bus	18	8	12	4
Rented car	1	1	1	1
Train	-	1	1	1
Camper or RV	3	1	1	1
Boat	1	*	-	*

* Less than 0.5%

+ Note: Small base

** Total most and second most recent trip

Within Canada and the U.S., private car was the most common mode of travel (43% and 68% incidence respectively), particularly among visitors to the U.S. border states (82%). Compared with other destinations, a rented car (29%) was used more often by travelers elsewhere in the U.S. mainland, and a bus between cities (36%) was used more often by travelers to Canada.

(Reference: Table 8B

TABLE 8B

MODE OF TRANSPORTATION USED WITHIN
CANADA AND MAINLAND U.S.**

	Canada	MAINLAND U.S.		
		Total	Border states	Elsewhere on mainland
Total trips taken by respondents (100%)	76+	1991	1091	900
	%	%	%	%
Private car	43	68	82	52
Rented car	19	18	9	29
Public transportation (within cities)	17	11	9	15
Bus (between cities)	36	5	3	8
Plane	9	3	2	5
Boat	3	1	*	1
Train	6	1	*	2
Camper or RV	5	1	1	2

*   Less than 0.5%
+   Note: Small base
** Total most and second most recent trip

2.5   Number of nights away

Detailed trip characteristics were obtained about the trips of four nights or more <u>outside Mexico</u> taken by respondents in the past three years. Respondents who had taken only one such trip were asked about that trip; those who had taken two or more such trips were asked about either their most recent <u>or</u> their second most recent trip on a random basis.

The average duration of these trips was 22.1 nights, but there was a large variation depending on the destination visited.   Trips that included the United States as a destination tended to be shorter in duration (19.3 nights on average) than trips that included Canada or other countries as destinations (40.3 and 37.5 nights respectively). Within the mainland U.S., trips that included the border states tended to be slightly longer than trips elsewhere on the mainland (21.4 vs. 16.4 nights respectively).

(Reference: Table 9)

TABLE 9

NUMBER OF NIGHTS AWAY ON

<u>TRIP OUTSIDE MEXICO</u>

			TRIPS THAT INCLUDED:*			
		Canada	U.S.			Other
					Elsewhere	
				Border	on	
	Total		Total	states	mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
4 - 6 nights	30	8	34	37	30	7
7 - 9 nights	19	6	20	18	23	11
10 - 16 nights	25	29	25	23	29	21
17 - 29 nights	9 ⎤ 26	23 ⎤ 57	7 ⎤ 20	9 ⎤ 23	5 ⎤ 18	21 ⎤ 61
30 or more nights	17 ⎦	34 ⎦	13 ⎦	14 ⎦	13 ⎦	40 ⎦
Mean++	22.1	40.3	19.3	21.4	16.4	37.5

+   Note: Small base
*   On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.
++ The mean reflects the length of stay of the entire trip, not necessarily the number of nights spent in Canada or the U.S.

2.6   Month of departure

Summer (44%) was the most popular time of year for travel, followed by fall (25%). The distribution of travel through the year was similar for all destinations.

(Reference: Table 10)

TABLE 10

MONTH TRIP OUTSIDE MEXICO WAS STARTED

		DESTINATION*			
		Canada	U.S.		Other
	Total	Total	Total	Border states	Elsewhere on mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Winter	(15)	(2)	(16)	(17)	(15)	(12)
December	9	-	10	10	9	8
January	3	2	3	3	2	3
February	3	-	3	3	4	2
Spring	(16)	(9)	(16)	(15)	(17)	(16)
March	5	5	5	5	5	5
April	7	4	7	6	7	6
May	4	-	4	4	5	5
Summer	(44)	(58)	(44)	(42)	(46)	(45)
June	9	6	9	8	9	13
July	18	35	18	17	19	18
August	17	16	17	17	18	14
Fall	(25)	(31)	(24)	(26)	(22)	(27)
September	12	23	11	11	11	15
October	7	8	6	7	5	10
November	6	-	7	8	6	3

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.7 Traveling party

Among travel parties that did not include children under 18 years, the mean number of members was 2.4. Parties that included children were much larger with 5.9 members on average.

(Reference: Table 11A)

Only 21% of travelers went on a trip by themselves. A larger number took a trip either with their wife/husband/girl friend/boy friend (37%) or with other relatives (33%). Children were present in 23% of travel parties, with the proportion ranging from a high of 27% for the U.S. border states to a low of 12% for "other" destinations.

(Reference: Figure 3 and Table 11B)

TABLE 11A

NUMBER OF PEOPLE IN IMMEDIATE

TRAVEL PARTY

			DESTINATION**			
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Parties without children under 18 years						
Total respondents took long haul trip without children (100%)	896	23+	750	409	336	139
	%	%	%	%	%	%
1	34	47	34	40	26	34
2	34	31	33	31	36	42
3 or more	32	22	33	29	38	24
Mean	2.4	2.3	2.4	2.2	2.7	2.3
Parties with children under 18 years						
Total respondents took long haul trip with children (100%)	546	17+	500	311	188	41
	%	%	%	%	%	%
1	-	-	-	-	-	-
2	6	24	6	7	4	9
3	13	14	12	10	15	20
4	26	20	26	28	24	29
5 or more	55	42	56	55	57	42
Mean	5.0	4.6	5.1	5.0	5.2	4.4

+ Note: Small base

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

FIGURE 3

PEOPLE TRAVELED WITH ON TRIP OUTSIDE MEXICO

	Percentage
Wife/husband/girl friend/ boy friend	37%
Other relatives	33%
Child(ren)	23%
Traveled alone	21%
Father/mother	17%
Friends	12%
Organized group/club/etc.	2%
Business associates/ colleagues	1%

Based on 1,442 respondents traveled outside Mexico

Pleasure Travel Markets to North America - Mexico 1988
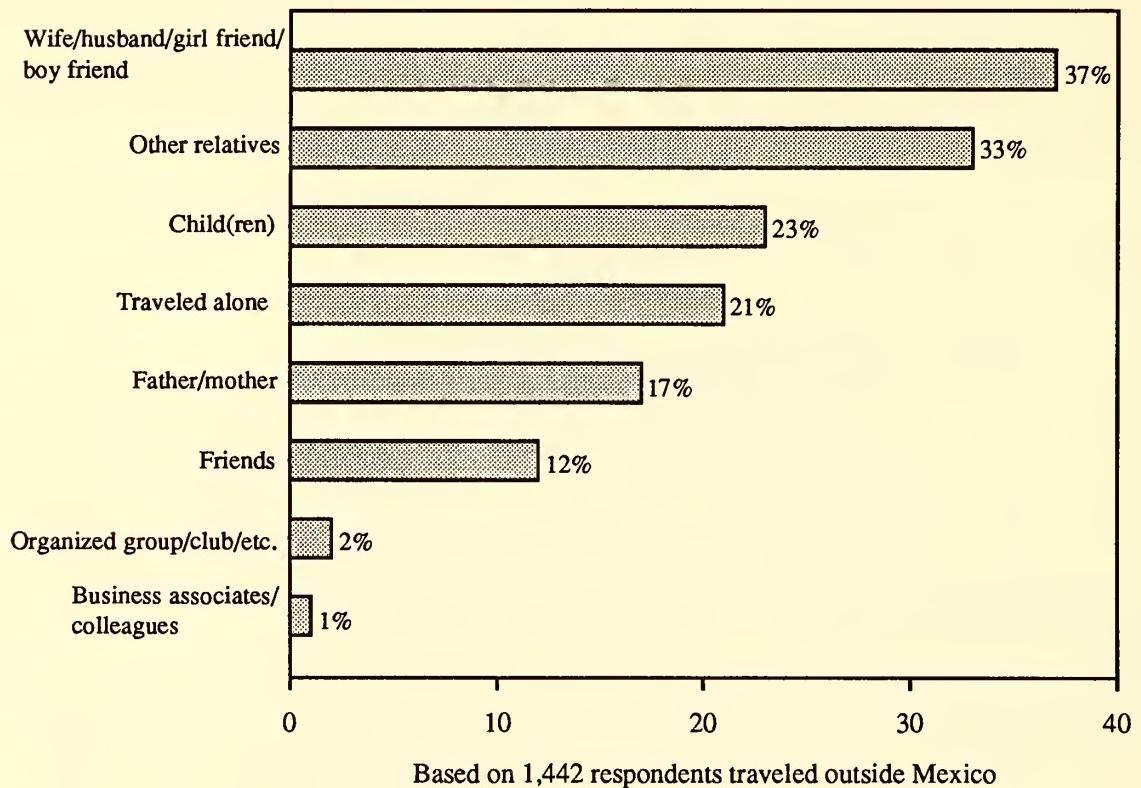
TABLE 11B

PEOPLE TRAVELED WITH ON TRIP OUTSIDE MEXICO

			DESTINATION*			
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Wife/husband/girl friend/boy friend	37	28	36	34	39	39
Other relatives	33	28	34	35	33	24
Child(ren)	23	19	24	27	21	12
Traveled alone	21	27	20	23	17	26
Father/mother	17	18	18	18	18	11
Friends	12	9	12	10	15	12
Organized group/club/etc.	2	3	1	1	1	2
Business associates/colleagues	1	-	1	1	2	1

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.8   How long before leaving was destination decided and trip booked

For almost two-thirds (64%) of all trips outside Mexico, the decision to go was made 1 month or less in advance.   The mean lead time was 2.3 months, with the figure being higher among travelers to Canada (4.3 months) and other countries (3.3 months) than among those who visited the U.S. (2.1 months).

(Reference: Table 12A)

TABLE 12A

NUMBER OF MONTHS BEFORE LEAVING
WAS DESTINATION DECIDED

			DESTINATION*			
		Canada		U.S.		Other
	Total	Total	Total	Border states	Elsewhere on mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
1 month or less	64	29	67	71	62	46
Over 1 month to 2 months	11	19	10	9	13	14
Over 2 months to 3 months	8	12	7	6	8	10
Over 3 months to 4 months	4	10	3	3	4	5
Over 4 months to 5 months	1	-	1	2	1	2
Over 5 months to 6 months	6	5	5	4	6	14
Over 6 months	7	24	6	6	7	10
Mean	2.3	4.3	2.1	2.0	2.2	3.3

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

In terms of actually <u>booking</u> the trip, the lead time involved was much shorter. The mean was 0.7 months, with the figure again being higher for Canada and other countries than for the U.S. Even for Canada, though, the majority of trips (68%) were booked 1 month or less before departure.

(Reference: Table 12B)

TABLE 12B

NUMBER OF MONTHS BEFORE LEAVING

WAS TRIP BOOKED

			DESTINATION*			
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
½ month or less	73	29	78	86	68	43
Over ½ month to 1 month	17	39	15	9	22	34
Over 1 month to 2 months	5	9	4	2	5	13
Over 2 months to 3 months	3	3	2	2	3	4
Over 3 months	3	20	2	1	3	7
Mean	<u>0.7</u>	<u>2.4</u>	<u>0.6</u>	<u>0.5</u>	<u>0.7</u>	<u>1.2</u>

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.9 Sources of information used in planning

More than one-third (36%) of travelers did not use any specific sources of information in planning their trips outside Mexico. This is an unusually high number when compared with an average of about 5% observed in most other countries surveyed. While other factors probably also played a part, much of this difference would arguably be explained by the mode of transportation used. Trips by private car would presumably require less formal planning than trips by plane. Mexico is the only country studied so far to allow more than plane trips to enter into the definition of a qualified traveler.

For the rest, travel agents (32%) and friends/family (31%) were almost equally popular as sources of information. No other sources received significant levels of mentions.

(Reference: Table 13A)

TABLE 13A

SOURCES OF INFORMATION USED
IN PLANNING A TRIP OUTSIDE MEXICO

	Sources used	Most important source used
Total respondents took a trip outside Mexico (100%)	1442	1442
	%	%
Travel agent	32	26
Friends/family	31	26
Brochures/pamphlets	8	3
Airline	6	4
Newspaper/magazine articles	3	1
Embassy/consulate	2	1
Government tourism office/board	2	1
Books/library	1	1
Tour operator/company	1	*
Advertisements	1	*
Clubs/associations	1	1
Automobile associations	*	-
Other	1	1
None	36	36
Mean number of sources used	0.9	

* Less than 0.5%

Travelers to the U.S. border states were the most likely <u>not</u> to use any specific sources of information in planning their trip (47%). They were also more likely than any other destination to rely on friends/family (29%), as opposed to a travel agent (14%), for information. For all remaining destinations, travel agents were the most important source of information, particularly for "other" destinations (48%).

(Reference: Table 13B)

TABLE 13B

MOST IMPORTANT SOURCES OF INFORMATION USED
IN PLANNING TRIP OUTSIDE MEXICO

| | | | DESTINATION** | | | |
| | | Canada | U.S. | | | Other |
	Total	Total	Total	Border states	Elsewhere on mainland	
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Friends/family	26	20	27	29	24	18
Travel agent	26	31	23	14	36	48
Airline	4	-	3	3	4	6
Brochures/pamphlets	3	12	4	3	5	1
Books/library	1	4	1	*	1	*
Newspaper/magazine articles	1	2	1	*	1	1
Clubs/associations	1	-	1	1	*	2
Government tourism office/board	1	2	1	1	1	1
Embassy/consulate	1	-	*	*	*	2
Tour operator/company	*	-	*	*	1	-
Advertisements	*	-	*	1	*	*
Other	1	3	1	1	*	1
None	36	26	38	47	27	18

* Less than 0.5%

+ Note: Small base

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.10 Whether a package trip

The most common type of trip was an independent trip i.e. a trip that included neither a flight/accommodation package nor a guided tour. A total of 84% of travelers outside Mexico took an independent trip. At first glance, this high percentage might be attributed to the fact that most car trips would be unlikely to involve package travel. Even among plane travelers, however, independent travel was high (72%).

The "explanation" lies in the destination visited. A total of 57% of travelers to destinations outside North America took independent trips, a figure similar to results observed in a number of countries surveyed. This figure climbed to 95% for the U.S. border states, and 76% for elsewhere on the mainland.

(Reference: Table 14A and Figure 4)

TABLE 14A

TYPE OF TRIP OUTSIDE MEXICO

By any mode of transportation	Total	Canada	U.S. Total	Border states	Elsewhere on mainland	Other
Total respondents took a trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Independent	84	73	87	95	76	57
All-inclusive guided tour (flight and accommodation and guided tour)	7	12	4	1	9	28
Flight and accommodation package only	7	2	7	2	12	10
Guided tour only	3	14	2	1	3	5
By plane						
Total respondents took a trip by plane outside Mexico (100%)	800	28+	621	232	382	172
	%	%	%	%	%	%
Independent	72	74	76	89	69	55
All-inclusive guided tour (flight and accommodation and guided tour)	13	16	9	3	12	29
Flight and accommodation package only	13	3	13	8	17	11
Guided tour only	3	8	2	1	3	5

*   Less than 0.5%
+   Note: Small base
** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

FIGURE 4

TYPE OF TRIP OUTSIDE MEXICO

BY ANY MODE OF TRANSPORTATION

Independent (84%)

Guided tour only (3%)

All-inclusive guided tour (7%)

Flight and accommodation package only (7%)
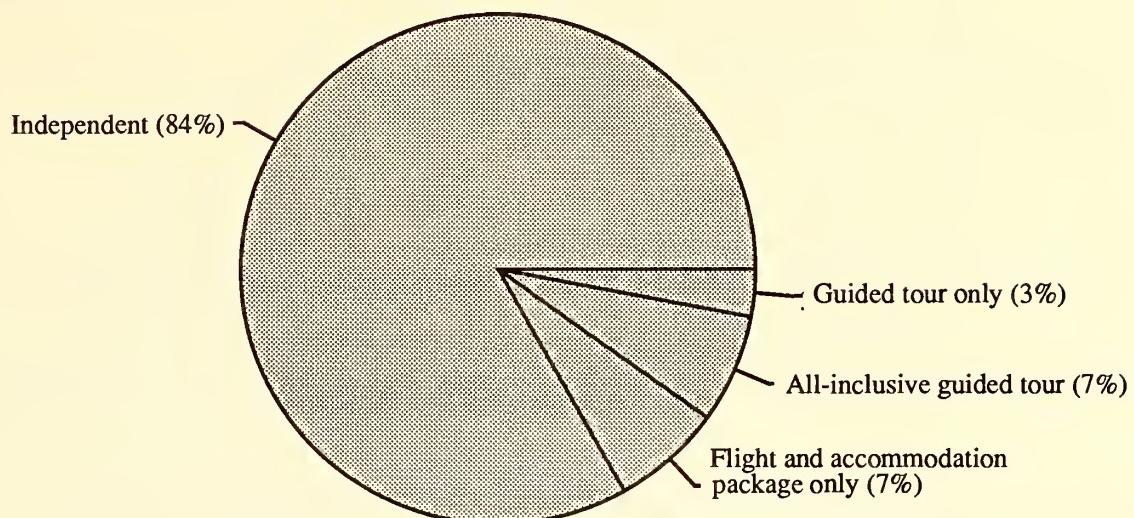
Based on 1,442 respondents who took such a trip

BY PLANE

Independent (72%)

Guided tour only (3%)

Flight and accommodation package only (13%)

All-inclusive guided tour (13%)
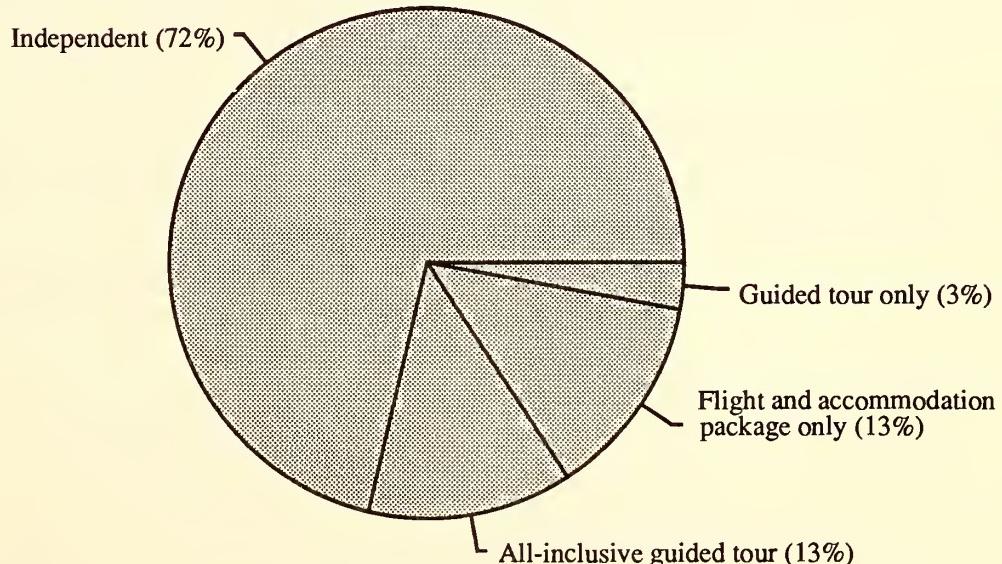
Based on 800 respondents who took such a trip

2.11 <u>Where booked</u>

Nearly all (89%) of the flight and accommodation packages (which may or may not have included a guided tour) were booked with travel agents.

(Reference: Table 15)

Of the travelers who took a guided tour (which may or may not have included a flight and accommodation package), a high percentage (82%) booked through a travel agent. The numbers that booked either through a tour/holiday company or an airline were insignificant.

(Reference: Table 16)

Respondents who had <u>not</u> taken a flight/accommodation package were asked separately where they had booked their flight and where they had booked their accommodation.

Only about one-half (53%) of the respondents who traveled by plane booked their flight through a travel agent, while 39% booked directly with the airline. Travelers to U.S. border states were more likely than travelers to other destinations to book directly with the airline.

In terms of accommodation, among respondents who traveled either by plane or by other means of transportation, only 11% booked through a travel agent, while a total of 54% stayed with friends or relatives. Most of the remaining respondents either booked with the hotel directly (22%) or did not book in advance (12%).

Consistent with the relatively higher level of trips to visit friends and relatives (see Section 2.3), the incidence of staying with friends or family was higher for trips to U.S. border states (62%) than for trips elsewhere.

(Reference: Table 17)

Due to the high number of independent trips, and trips that did not involve a flight by plane, only 38% of travelers overall used a travel agent to book any part of their trip outside Mexico. This figure was 19% for the border states, 52% for the rest of the mainland U.S., and 71% for other destinations outside North America.

(Reference: Table 18)

TABLE 15

WHERE FLIGHT AND ACCOMMODATION PACKAGE
WAS BOOKED

		DESTINATION*				
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Total respondents took flight/ accommodation package (100%)	202	5+	138	25+	110	66
	%	%	%	%	%	%
Travel agent	89	100	89	86	90	86
Airline	8	-	8	8	8	6
Other	3	-	2	-	2	8

TABLE 16

WHERE GUIDED TOUR WAS BOOKED

		DESTINATION*				
		Canada	U.S.			Other
	Total		Total	Border states	Elsewhere on mainland	
Total respondents took guided tour (100%)	136	10+	79	17+	56+	58
	%	%	%	%	%	%
Travel agent	82	66	84	66	90	82
Tour company/holiday company	7	13	6	11	4	9
Airline	2	-	1	-	-	3
Others	9	21	9	23	6	6

+ Note: Small base
* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

TABLE 17

WHERE SEPARATE FLIGHT AND ACCOMMODATION WAS BOOKED

| | | | DESTINATION* | | | |
| | | Canada | U.S. | | | Other |
Flight (to destination only)	Total		Total	Border states	Elsewhere on mainland	
Total respondents took independent trip outside Mexico by plane (100%)	598	23+	483	208	273	104
	%	%	%	%	%	%
Travel agent	53	61	51	43	58	64
Airline directly	39	30	39	47	34	35
Did not book	6	–	7	10	6	–
Other	2	9	2	1	3	1
Accommodation (can be more than one)						
Total respondents took independent trip outside Mexico (100%)	1239	35+	1111	694	413	112
	%	%	%	%	%	%
Stayed with friends/relatives	54	33	55	62	44	44
Hotel directly	22	27	21	20	23	26
Travel agent	11	21	11	6	18	18
Other	5	12	4	3	6	7
Did not book in advance	12	7	12	11	14	11

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

TABLE 18

WHERE COMPONENTS OF TRIP OUTSIDE MEXICO WERE BOOKED

(Total unduplicated mentions)

|			DESTINATION**			
		Canada	U.S.			Other
				Border states	Elsewhere on mainland	
	Total		Total			
Total respondents took trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Travel agent	38	60	33	19	52	71
Airline	19	17	19	13	20	16
Direct with hotel etc.	17	24	16	19	19	23
Tour company/holiday company	1	3	*	*	*	3
Others	5	14	5	4	6	8
Did not book accommodation in advance	12	6	13	13	13	6
Stayed with friends/relatives	46	29	50	60	36	28
Did not travel by plane	45	30	50	68	27	5

* Less than 0.5%

\+ Note: Small base

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.12 <u>Activities taken part in</u>

Respondents were shown a list of 38 activities that people might participate in during a holiday, and were asked to name the ones that they had actually taken part in on their trip.

The overall answers were somewhat predictable e.g. the most frequent mentions were such activities as sampling local foods (89%), shopping (89%), and dining out in restaurants (88%).

When comparing activities across the different destinations, the first thing that stands out is that virtually all activities were mentioned less frequently for the U.S. than for other destinations. (The main exceptions were visiting friends or relatives and amusement or theme parks.) Within the U.S., almost all activities received fewer mentions for the border states than elsewhere. This suggests that travelers to the U.S. tried to fit fewer activities into their vacation, perhaps because of the relative ease of making a future return trip.

Due to this unique status of the U.S., the appropriate comparison for activities in Canada would be against other destinations outside North America. Despite the small base size involved, it appeared that visitors to Canada were more likely to take part in the following activities:

Canada - Taking pictures/filming (95%)
        - Visiting amusement or theme parks (65%)
        - Touring the countryside (63%)
        - Attending sporting events (41%)
        - Golfing/tennis (25%)
        - Fishing (25%)
        - Snow skiing (24%)

The following are examples of higher mentions for destinations elsewhere in the U.S. mainland compared with U.S. border states:

U.S. non-
border
states - Dining out in restaurants (93%)
       - Taking pictures/filming (76%)
       - Visiting places of historic interest (39%)
       - Attending concerts/live theatre (29%)
       - Going on short guided excursions or tours (26%)

(Reference: Table 19)

TABLE 19

ACTIVITIES TAKEN PART IN DURING TRIP OUTSIDE MEXICO

	Total	Canada Total	U.S. Total	Border states	Elsewhere on mainland	Other
DESTINATION*						
Total respondents took trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Sampling local foods	89	95	88	88	87	93
Shopping	89	93	90	88	92	87
Dining out in restaurants	88	93	88	85	(93)	89
Taking pictures/filming	72	(95)	70	66	(76)	79
Sightseeing in cities	70	92	68	65	71	85
Contacting the local inhabitants	62	83	60	59	62	76
Observing wildlife/bird watching	57	78	54	54	54	72
Visiting friends or relatives	56	51	(57)	65	46	46
Visiting amusement or theme parks	54	(65)	(56)	55	56	42
Visiting scenic landmarks	48	57	45	43	47	68
Visiting wilderness areas	46	74	44	41	48	62
Visiting health spas	43	67	41	41	42	53
Swimming	41	53	40	38	42	50
Visiting national parks or forests	41	70	39	38	40	54
Visiting galleries/museums	40	80	36	31	42	65
Attending local festivals/fairs/ special events	39	64	36	34	38	52
Visiting nightclubs, etc.	38	40	36	33	40	52
Visiting places of historic interest	37	68	32	26	(39)	70
Sunbathing or other beach activities	35	31	34	32	35	49
Visiting the oceanside	33	36	31	28	35	48
Touring the countryside	29	(63)	25	23	29	50

Note: Circled numbers represent those referred to in the main text
+ Note: Small base
* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

Pleasure Travel Markets to North America - Mexico 1988

TABLE 19 (cont'd)

ACTIVITIES TAKEN PART IN DURING TRIP OUTSIDE MEXICO

	Total	Canada Total	U.S. Total	Border states	Elsewhere on mainland	Other
Total respondents took trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Attending concerts/live theatre	26	57	23	19	(29)	43
Visiting sites commemorating important people	25	50	20	18	23	51
Going on short guided excursions or tours	24	50	19	14	(26)	57
Attending sporting events	21	(41)	21	22	20	19
Visiting places of importance in military history	19	45	16	14	19	35
Visiting casinos/gambling	17	23	16	13	19	25
Visiting places of archeological interest	17	40	13	12	14	43
Visiting mountainous areas	16	47	13	13	14	32
Water sports	10	23	10	7	12	10
Golfing/tennis	10	(25)	9	8	11	8
Fishing	7	(25)	6	6	6	10
Climbing, hiking, etc.	6	20	5	5	5	9
Taking a day cruise	6	17	5	3	7	19
Horse riding	3	15	3	3	3	3
Snow skiing	3	(24)	3	2	4	4
Taking a cruise of one or more nights	3	9	2	*	4	11
Hunting	2	5	2	2	2	1

DESTINATION**

Note: Circled numbers represent those referred to in the main text
* Less than 0.5%
+ Note: Small base
** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

2.13 <u>Satisfaction and likelihood of returning</u>

Travelers to destinations outside Mexico were well satisfied with their trips to all destinations. A total of 89% said that they were very satisfied, and a further 10% said that they were somewhat satisfied. Only 1% of the travelers felt they were not very satisfied.

(Reference: Table 20)

Overall, respondents seemed interested in returning to previously visited destinations. In total, 82% said they would be very or somewhat likely to return, including 56% who said they would be very likely to do so.

The likelihood of returning was higher for Canada and the U.S. than it was for other destinations.

(Reference: Table 21)

TABLE 20

DEGREE OF SATISFACTION WITH
TRIP OUTSIDE MEXICO

			DESTINATION**			
		Canada	U.S.			Other
				Border states	Elsewhere on mainland	
	Total		Total			
Total respondents took trip outside Mexico (100%)	1442	40+	1250	719	524	180
	%	%	%	%	%	%
Very satisfied (X4)	89	95	89	87	91	91
Somewhat satisfied (X3)	10	5	10	12	8	6
Not very satisfied (X2)	1	-	1	1	1	2
Not at all satisfied (X1)	*	-	*	*	*	*
Mean	3.9	4.0	3.9	3.9	3.9	3.9

+ Note: Small base

** On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

TABLE 21

LIKELIHOOD OF RETURNING TO
SAME DESTINATION OUTSIDE MEXICO

		Total	Canada Total	U.S. Total	Border states	Elsewhere on mainland	Other
Total respondents took trip outside Mexico (100%)		1442	40+	1250	719	524	180
		%	%	%	%	%	%
Very likely	(X4)	56 ⎤ 82	41 ⎤ 82	58 ⎤ 84	60 ⎤ 87	55 ⎤ 79	46 ⎤ 68
Somewhat likely	(X3)	26 ⎦	41 ⎦	26 ⎦	27 ⎦	24 ⎦	22 ⎦
Not very likely	(X2)	11	13	10	8	13	18
Not at all likely	(X1)	8	5	7	5	8	15
Mean		3.3	3.2	3.3	3.4	3.3	3.0

+ Note: Small base

* On the one long haul trip as described in Section 2.5. Some respondents did not take such a trip. Some respondents had more than one destination. Accordingly, the total column does not always reflect the sum of the individual columns.

3.   LIKELY VACATION DESTINATIONS

3.1   Places would like to visit overseas (unaided)

Respondents were asked on an unaided basis to name five places outside Mexico they would like to visit on a vacation trip, as well as the one place they would most like to visit in the next two years. These questions provided an indication of the level of interest in visiting Canada and the U.S. in the context of all destinations available to travelers.

With respect to the five top choices, the most frequent mentions were destinations in Europe (81%), followed by the U.S. (58%), Canada (34%), South America (30%), and Asia (30%). The figure for the U.S. included 32% who mentioned the border states and 42% who mentioned somewhere else on the mainland; clearly some respondents mentioned both.

Although the actual figures were lower, responses for the one top choice destination followed a pattern similar to the above.

The United States, particularly the border states, were actually visited much more frequently than would be predicted by their number of mentions as a top choice destination.   The opposite was true for Europe, as it was visited on only 7% of trips despite being the most preferred destination of 41% of respondents. Canada was visited by only 3% despite being the top choice of 8%.

These results show that "like to visit" does not necessarily mean "likely to visit". The data indicate, however, an awareness of destinations yet to be visited.

(Reference: Table 22)

Respondents most interested in Canada or other destinations outside North America tended to be better educated and were more likely to come from Mexico City (also Merida in the case of Canada).

Those most interested in the U.S. border states were more likely than average to be female, older, married, a homemaker, from Guadalajara, less educated, a couple with children, from households with fewer adults over 18 years, and lower income.

Those most interested in destinations elsewhere in the U.S. were more likely than average to be younger and from Juarez.

(Reference: Table 23)

TABLE 22

DESTINATIONS OUTSIDE MEXICO WOULD LIKE TO VISIT

	Five top choices	One top choice	Actual destination of two most recent trips in past 3 years
Total respondents (100%)	2000	2000	(2333)**
	%	%	%
Europe	81	41	7
U.S. total (unduplicated mentions)	(58)	(28)	(84)
Border states	32	13	63
Elsewhere in mainland U.S.	42	12	20
Hawaii/Guam/Samoa	9	3	1
Canada	34	8	3
South America	30	5	2
Asia	30	9	*
West Indies/Caribbean	13	3	2
Africa	11	3	*
Near/Middle East	6	2	*
Australia/New Zealand	4	1	-
Central America	3	*	1
Other South Pacific	1	*	-

* Less than 0.5%
** Total trips taken by respondents

Pleasure Travel Markets to North America - Mexico 1988

TABLE 23

KEY DESTINATIONS WOULD MOST LIKE TO VISIT
BY DEMOGRAPHICS

| | | WOULD MOST LIKE TO VISIT ... | | | |
| | | Canada | U.S. | | | Other |
	Total	Total	Total	Border states	Elsewhere on mainland	
Total respondents (100%)	2000	156	557	262	241	1282
	%	%	%	%	%	%
Sex						
Male	50	50	46	42	50	52
Female	50	50	54	(58)	50	48
Age						
18 - 24 years	31	30	27	19	(36)	33
25 - 34 years	24	27	26	26	24	23
35 - 44 years	20	19	22	24	20	19
45 - 54 years	12	14	12	12	11	12
55 - 64 years	8	5	7	(10	5	8
65 years or over	6	5	6	10)	4	5
Marital status						
Single	41	42	33	25	40	44
Married	55	53	61	(68)	56	52
Living together	*	–	*	–	*	*
Divorced/separated/widowed	2	2	2	2	2	2
Other	3	3	4	6	2	2
Occupation						
Owner	3	3	3	2	3	4
Manager/executive	11	12	10	9	11	12
Professional/technical	22	25	17	17	15	24
Clerical/sales	13	10	16	18	15	11
Skilled worker	4	3	6	6	6	4
Unskilled worker	*	1	*	1	1	*
Student	18	20	13	7	19	20
Retired	4	3	4	5	4	4
Homemaker	24	24	30	(35)	26	21
Other	1	–	1	1	1	1
City						
Mexico City	40	(42)	20	15	22	(48)
Guadalajara	16	17	19	(24	15	15
Monterrey	16	6	25	27)	21	14
Hermosillo	9	6	13	14	13	8
Merida	9	(22)	7	5	9	9
Juarez	10	8	17	15	(19)	7

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 23 (cont'd)

KEY DESTINATIONS WOULD MOST LIKE TO VISIT
BY DEMOGRAPHICS

| | | | WOULD MOST LIKE TO VISIT ... | | | |
| | | Canada | U.S. | | | Other |
	Total	Total	Total	Border states	Elsewhere on mainland	
Total respondents (100%)	2000	156	557	262	241	1282
	%	%	%	%	%	%
Education						
Primary school	6	3	3	(19)	10	4
Junior college	7	4	10	11	10	6
Trade/technical/business	15	18	19	23	16	12
High school	22	27	21	15	26	22
University	50	(47)	37	33	39	(56)
Life cycle						
Live alone	2	1	1	2	1	2
Living with one adult	9	5	9	12	9	10
Single with children	23	27	21	16	26	24
Couple with children	42	44	50	(53)	45	38
Other	24	24	19	18	20	26
Living arrangement						
Live alone	2	1	1	2	1	2
Living with children (0-18)	66	72	72	71	72	62
Living without children (0-18)	32	27	27	27	27	36
Mean no. of adults 18 years or over	3.2	3.3	3.1	(2.9)	3.3	3.3
Whether any children under 18 years in household						
Yes	66	72	72	71	72	62
No	34	28	28	29	28	38
Household income in pesos (1987/88 financial year)						
11,000,000 and under	26	31	30	(33)	27	24
11,000,001 - 17,000,000	21	15	23	25	22	20
17,000,001 - 25,000,000	20	18	20	21	19	19
Over 25,000,000	25	22	19	17	22	28
Refused	9	14	7	4	11	9

Note: Circled numbers represent those referred to in the main text

3.2 <u>Likelihood of visiting place would most like to visit</u>

Overall, 55% of respondents said that it was likely that they would travel in the next two years to the destination they named as the one they would most like to visit. Only 9%, however, thought that they would definitely do so.

The likelihood of traveling to the U.S., particularly the border states, was higher than it was for other places.

(Reference: Table 24)

TABLE 24

LIKELIHOOD OF VISITING THE ONE
PLACE WOULD MOST LIKE TO VISIT

		Total	WOULD MOST LIKE TO VISIT ... Canada Total	U.S. Total	U.S. Border states	U.S. Elsewhere on mainland	Other
Total respondents named a destination (100%)		2000	156	557	262	241	1282
		%	%	%	%	%	%
Definitely	(X5)	9	8	13	19	8	7
Very likely	(X4)	24 ⎰55	22 ⎰63	42 ⎰75	49 ⎰81	37 ⎰71	17 ⎰45
Likely	(X3)	22	33	20	13	26	21
Might or might not	(X2)	19	22	14	11	14	21
Not likely	(X1)	26	15	12	8	15	34
Mean		2.7	2.9	3.3	3.6	3.1	2.4

3.3 Places in U.S./Canada Mexicans might go on vacation

In order to obtain a measure of awareness of specific vacation destinations within Canada and the U.S., respondents were asked to name:

1. Five places that people might go on vacation (unaided)

2. Three other places that people might go on vacation (this time aided by a map)

The above questions were asked separately for Canada and the U.S.

In the data processing stage, answers were coded exactly as given by respondents and a full listing is available under separate cover. For the purposes of the main computer tables and this report, however, responses were grouped and reported for the following categories:

Canada   - 10 provinces and two territories
             - Any specific location with 50 or more mentions

U.S.   - Top states
             - 11 census divisions (see Appendix III)
             - Eight travel regions (see Appendix III)
             - Any specific location with 75 or more mentions

For example, answers grouped into "California" would include mentions of California plus any mentions of Los Angeles, Yosemite National Park, Disneyland, and so on. A respondent naming both Los Angeles and San Francisco, though, would only count as one California mention.

A similar coding scheme was also followed for all of the remaining questions in this section of the report.

When asked on an unaided basis to name destinations in the U.S. and Canada where people might go on a vacation, most respondents (99%) mentioned at least one place in the U.S. Only a smaller percentage (76%) were able to name at least one place in Canada. On a total unaided and aided basis, however, all respondents mentioned a place in both the U.S. and Canada.

(Reference: Table 25)

TABLE 25

WHETHER OR NOT RESPONDENT NAMED ANY PLACES
PEOPLE MIGHT GO ON A VACATION

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents (100%)	2000	2000	2000
	%	%	%
Canada			
Yes	76	99	100
No	24	1	-
U.S.			
Yes	99	99	100
No	1	1	-

Specific results for awareness of vacation destinations were as follows:

Canada   - On an <u>unaided</u> basis, the most frequently named destinations were in Ontario (83%) and Quebec (62%). The next most frequent mentions were destinations in British Columbia (33%).

            Specific destinations with the highest level of unaided mentions were Montreal (45%), Ottawa (40%), Toronto (36%), Quebec City (35%), Niagara Falls (32%), and Vancouver (23%).

        - On a <u>total unaided and aided</u> basis, destinations in Ontario (90%) and Quebec (86%) continued to be the top mentions, followed by British Columbia (57%) and Alberta (43%).

            Specific destinations also repeated the same order as seen on an unaided basis, with the exception of Quebec City (61%) which moved from fifth to second position behind Montreal (65%).

(Reference: Table 26A)

U.S.   - On an <u>unaided</u> basis, mentions were heavily skewed towards destinations in California (82%), followed by New York (47%), Florida (41%) and Texas (41%).

The main specific mentions in California were Los Angeles (49%), and San Francisco (39%). In New York, the destination most frequently mentioned was New York City (41%), and in Florida the top destination was Miami (28%).

On a <u>total unaided and aided</u> basis, almost all respondents (90%) mentioned at least one California destination, and most mentioned destinations in New York (63%) and Florida (60%). Texas (54%), Nevada (43%), and Washington, D.C. (39%) also received significant mentions.

Again, the specific destinations mentioned followed the same order as on an unaided basis, namely Los Angeles (56%) and San Francisco (47%) in California, New York City (54%) in New York, and Miami (40%) in Florida.

(Reference: Table 26B)

TABLE 26A

VACATION DESTINATIONS IN CANADA - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1529	1987	1998
	%	%	%
Provinces and Territories			
Newfoundland/Labrador	2	10	11
P.E.I.	*	2	2
Nova Scotia	1	4	5
New Brunswick	*	2	2
Quebec	62	56	86
Ontario	83	64	90
Manitoba	4	14	16
Saskatchewan	2	10	11
Alberta	19	34	43
British Columbia	33	40	57
Yukon	2	10	11
Northwest Territories	1	3	4
Specific Destinations			
Montreal	45	31	65
Ottawa	40	14	44
Toronto	36	14	41
Quebec City	35	34	61
Niagara Falls	32	17	41
Vancouver	23	17	34
Calgary	12	15	25
Vancouver Island	8	12	18
Victoria	5	5	9
Winnipeg	2	7	8
Edmonton	1	4	5
Queen Charlotte Islands	1	2	3
Regina	1	5	6
Prince Albert National Park	*	3	3
Thunder Bay	*	3	3

* Less than 0.5%

TABLE 26B

VACATION DESTINATIONS IN THE U.S. - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1979	1986	1999
	%	%	%
Top States			
California	82	28	90
New York	47	19	63
Florida	41	25	60
Texas	41	19	54
Nevada	25	20	43
Washington D.C.	21	18	39
Illinois	15	9	24
Louisiana	12	10	21
Arizona	10	13	22
Colorado	7	15	22
Massachusetts	7	3	10
Washington	5	6	10
Pennsylvania	5	12	16
8 Travel Regions			
Travel South	50	42	73
Visit U.S. West	88	56	96
New England	8	5	12
Old West Trail Foundation	3	12	14
America's Heartland	17	22	36
Foremost West	19	34	46
George Washington Country	25	30	49
Great Lakes	23	29	45

TABLE 26B (cont'd)

VACATION DESTINATIONS IN THE U.S. - AWARENESS

	5 places people might go on vacation (unaided)	3 more places people might go on vacation (aided)	Total unaided and aided mentions
Total respondents mentioned a place (100%)	1979	1986	1999
	%	%	%
11 Census Divisions			
West North Central	7	19	25
East South Central	2	6	7
New England	8	5	12
Middle Atlantic	49	30	68
Middle Atlantic (excluding New York)	5	12	17
East North Central	21	23	40
South Atlantic	56	46	79
South Atlantic (excluding Florida)	24	26	47
West South Central	51	31	68
Mountain	41	50	71
Pacific	84	36	92
Pacific (excluding California)	6	10	15
Pacific Islands	*	*	*
Atlantic Islands	-	-	-
Specific Destinations			
Los Angeles	49	8	56
New York City	41	14	54
San Francisco	39	8	47
Miami	28	12	40
Las Vegas	23	11	33
Houston	21	5	26
San Diego	20	7	26
Disneyland	15	6	20
Chicago	15	8	22
San Antonio	13	5	18
New Orleans	12	6	18
Dallas	11	5	16
Orlando	8	4	12
Boston	6	3	9
Pasadena	5	1	6
Tuscon	4	3	7
Denver	4	5	9
Disney World	3	3	6
Phoenix	3	2	4
Philadelphia	3	3	5
Grand Canyon National Park	2	4	6
Niagara Falls	2	3	4
Kansas City	1	4	4

* Less than 0.5%

3.4   Places in U.S./Canada ever visited and visited in past 3 years

Considering that Mexico and the U.S. share a common border, it is not surprising that a high proportion (87%) of respondents had actually visited destinations in the U.S. at some time, including 83% who had done so in the past three years. In contrast, relatively few (18%) had ever visited Canada, and only 6% in the past three years.

(Reference: Table 27)

Respondents were asked to name the places they had visited at any time in Canada and the U.S., as well as those they had visited in the past three years. Not surprisingly, the responses to these two questions tended to be correlated.

The comments that follow refer to destinations visited in the past three years as these would presumably better reflect current tastes of Mexican travelers:

Canada   - Among respondents who had traveled to Canada in the past three years, the most popular destinations were in Ontario (63%, mainly Toronto, Niagara Falls and Ottawa), Quebec (51%, mainly Montreal and Quebec City), and British Columbia (33%, mainly Vancouver).

(Reference: Table 28A)

U.S.   - The state most visited in the past three years was California (53%, mainly Los Angeles, San Francisco and San Diego). The next most popular state was Texas (40%, mainly Houston and San Antonio).

(Reference: Table 28B)

TABLE 27

VISITED CANADA OR U.S. - EVER OR
IN PAST THREE YEARS

	Total
Total respondents (100%)	2000
	%
Canada	
Ever visited	18
Visited in past three years	6
U.S.	
Ever visited	87
Visited in past three years	83

TABLE 28A

VACATION DESTINATIONS IN CANADA - WHETHER VISITED

	Ever visited	Visited in past 3 years
Total respondents visited Canada (100%)	350	117
	%	%
Provinces and Territories		
Newfoundland/Labrador	1	1
P.E.I.	1	1
Nova Scotia	2	1
New Brunswick	1	1
Quebec	66	51
Ontario	74	63
Manitoba	4	4
Saskatchewan	2	1
Alberta	14	14
British Columbia	32	33
Yukon	2	2
Northwest Territories	*	-
Specific Destinations		
Montreal	57	41
Toronto	46	45
Niagara Falls	41	36
Quebec City	38	30
Ottawa	29	23
Vancouver	24	24
Victoria	10	11
Calgary	8	8
Vancouver Island	5	8
Winnipeg	2	-
Edmonton	-	4

TABLE 28B

VACATION DESTINATIONS IN THE U.S. - WHETHER VISITED

	Ever visited	Visited in past 3 years
Total respondents visited the U.S. (100%)	1685	1307
	%	%
Top States		
California	71	53
Texas	51	40
Florida	29	19
New York	24	10
Nevada	20	12
Arizona	19	15
Illinois	10	4
Louisiana	10	4
Washington D.C.	9	3
Colorado	7	3
Pennsylvania	5	2
Washington	4	2
Massachusetts	4	1
8 Travel Regions		
Travel South	35	22
Visit U.S. West	76	61
New England	4	1
Old West Trail Foundation	2	*
America's Heartland	15	6
Foremost West	29	20
George Washington Country	13	5
Great Lakes	15	6

* Less than 0.5%

TABLE 28B (cont'd)

VACATION DESTINATIONS IN THE U.S. - WHETHER VISITED

	Ever visited	Visited in past 3 years
Total respondents visited the U.S. (100%)	1685	1307
	%	%
11 Census Divisions		
West North Central	6	2
East South Central	3	1
New England	4	1
Middle Atlantic	25	11
Middle Atlantic (excluding New York)	6	2
East North Central	14	6
South Atlantic	35	22
South Atlantic (excluding Florida)	12	5
West South Central	55	42
Mountain	41	28
Pacific	72	54
Pacific (excluding California)	6	3
Pacific Islands	*	–
Atlantic Islands	*	–
Specific Destinations		
Los Angeles	50	35
San Francisco	27	13
San Diego	26	16
Houston	23	16
San Antonio	21	14
New York City	20	9
Miami	19	12
Las Vegas	17	10
Dallas	14	9
Disneyland	13	8
Tuscon	10	8
Chicago	10	3
New Orleans	9	3
Orlando	8	6
Phoenix	8	5
Pasadena	7	5
Denver	3	2
Philadelphia	3	1
Boston	3	1
Disney World	2	1
Grand Canyon National Park	2	1

* Less than 0.5%

3.5   Places in U.S./Canada most interested in visiting/revisiting

As another measure of vacation destinations in Canada and the U.S., respondents were asked to name the three places that they were most interested in visiting or revisiting. These questions were designed to provide an indication of the potential travel market to North America.   Nearly all respondents named at least one place in Canada (99%) or the U.S. (98%) that they were interested in visiting.

(Reference: Table 29)

Although the first choice is also reported in the tables, the following figures refer to the three destinations of greatest interest:

Canada   - The provinces which respondents were most interested in visiting or re-visiting were Ontario (78%), Quebec (74%), British Columbia (36%), and Alberta (22%).   These figures are higher, but in the same descending order, as those reflected in the destinations actually visited in the past three years (see Table 28A).

(Reference: Table 30A)

U.S.   - In terms of interest, California (62%) dominated all states followed by New York (39%), Florida (33%), and Texas (21%). This represents a reversal of positions for New York and Texas when compared with the destinations actually visited (see Table 28B).

New York City (33%) was the specific destination most likely to be named, followed by Los Angeles (27%), San Francisco (25%) and Miami (20%).

(Reference: Table 30B)

TABLE 29

WHETHER OR NOT NAMED ANY PLACES

INTERESTED IN VISITING

Total respondents (100%)	2000
	%
Canada	
Yes	99
No	1
U.S.	
Yes	98
No	2

TABLE 30A

VACATION DESTINATIONS IN CANADA - INTEREST IN VISITING

	First choice	Top three choices
Total respondents providing choices (100%)	1982	1982
	%	%
Provinces and Territories		
Newfoundland/Labrador	1	6
P.E.I.	*	1
Nova Scotia	1	2
New Brunswick	*	1
Quebec	35	74
Ontario	40	78
Manitoba	1	6
Saskatchewan	1	6
Alberta	6	22
British Columbia	13	36
Yukon	1	6
Northwest Territories	1	2
Specific Destinations		
Montreal	21	49
Niagara Falls	18	29
Quebec City	12	42
Vancouver	7	18
Toronto	7	23
Ottawa	6	21
Calgary	4	12
Vancouver Island	3	11
Victoria	1	3
Regina	*	4

* Less than 0.5%

TABLE 30B

VACATION DESTINATIONS IN THE U.S. - INTEREST IN VISITING

	First choice	Top three choices
Total respondents providing choices (100%)	1962 %	1962 %
Top States		
California	31	62
New York	18	39
Florida	13	33
Texas	7	21
Nevada	7	20
Washington D.C.	5	17
Louisiana	3	9
Arizona	2	7
Colorado	2	7
Illinois	2	9
Pennsylvania	2	5
Massachusetts	1	4
Washington	1	4
8 Travel Regions		
Travel South	13	42
Visit U.S. West	41	75
New England	2	5
Old West Trail Foundation	1	4
America's Heartland	5	14
Foremost West	4	17
George Washington Country	7	21
Great Lakes	5	18

TABLE 30B (cont'd)

VACATION DESTINATIONS IN THE U.S. - INTEREST IN VISITING

	First choice	Top three choices
Total respondents providing choices (100%)	1962	1962
	%	%
11 Census Divisions		
West North Central	2	8
East South Central	*	2
New England	2	5
Middle Atlantic	19	43
Middle Atlantic (excluding New York)	2	5
East North Central	4	15
South Atlantic	19	48
South Atlantic (excluding Florida)	6	20
West South Central	10	30
Mountain	12	35
Pacific	32	65
Pacific (excluding California)	1	6
Pacific Islands	*	*
Atlantic Islands	*	*
Specific Destinations		
New York City	15	33
Los Angeles	11	27
San Francisco	8	25
Miami	7	20
Las Vegas	6	16
Disneyland	5	10
New Orleans	3	8
San Diego	3	9
Houston	3	9
Orlando	2	6
Chicago	2	8
Dallas	1	5
San Antonio	1	5
Philadelphia	1	2
Disney World	1	2
Boston	1	4
Niagara Falls	1	2
Grand Canyon National Park	*	2

* Less than 0.5%

3.6   Summary of awareness, interest and visitation

A summary of awareness, interest and visitation is provided in Tables 31A and 31B. For Canada, all three of these measures generally yielded similar results. There was only the occasional exception such as Toronto which was visited more than would be predicted by its awareness and interest levels.

For the U.S., awareness and interest tended to follow similar patterns, except that the figures for interest tended to be somewhat lower. This would be partly attributable to the fact that they were based on only three mentions per respondent, while the awareness figures were based on up to five members per respondent.

In terms of visitation, several destinations such as New York, Florida and Washington, D.C. were visited less often than would be predicted by their awareness and interest levels. On the other hand, states like California and Texas are visited at levels in line with awareness and interest.

(Reference: Tables 31A and 31B)

TABLE 31A

SUMMARY OF AWARENESS, INTEREST AND VISITATION - CANADA

	5 places people might go on vacation (unaided)	Top 3 places interested in visiting	Visited in past 3 years
Total respondents mentioned a place (100%)	1529	1982	117
	%	%	%
Provinces and Territories			
Newfoundland/Labrador	2	6	1
P.E.I.	*	1	1
Nova Scotia	1	2	1
New Brunswick	*	1	1
Quebec	62	74	51
Ontario	83	78	63
Manitoba	4	6	4
Saskatchewan	2	6	1
Alberta	19	22	14
British Columbia	33	36	33
Yukon	2	6	2
Northwest Territories	1	2	-
Specific Destinations			
Montreal	45	49	41
Ottawa	40	21	23
Toronto	36	23	45
Quebec City	35	42	30
Niagara Falls	32	29	36
Vancouver	23	18	24
Calgary	12	12	8
Vancouver Island	8	11	8
Victoria	5	3	11
Winnipeg	2	-	-
Edmonton	1	-	4
Queen Charlotte Islands	1	-	-
Regina	1	4	-
Prince Albert National Park	*	-	-
Thunder Bay	*	-	-

* Less than 0.5%

TABLE 31B

SUMMARY OF AWARENESS, INTEREST AND VISITATION - U.S.

	5 places people might go on vacation (unaided)	Top 3 places interested in visiting	Visited in past 3 years
Total respondents mentioned a place (100%)	1979	1962	1307
	%	%	%
Top States			
California	82	62	53
New York	47	39	10
Florida	41	33	19
Texas	41	21	40
Nevada	25	20	12
Washington D.C.	21	17	3
Illinois	15	9	4
Louisiana	12	9	4
Arizona	10	7	15
Colorado	7	7	3
Massachusetts	7	4	1
Washington	5	4	2
Pennsylvania	5	5	2
8 Travel Regions			
Travel South	50	42	22
Visit U.S. West	88	75	61
New England	8	5	1
Old West Trail Foundation	3	4	*
America's Heartland	17	14	6
Foremost West	19	17	20
George Washington Country	25	21	5
Great Lakes	23	18	6

* Less than 0.5%

TABLE 31B (cont'd)

SUMMARY OF AWARENESS, INTEREST AND VISITATION - U.S.

	5 places people might go on vacation (unaided)	Top 3 places interested in visiting	Visited in past 3 years
Total respondents mentioned a place (100%)	1979	1962	1307
	%	%	%
11 Census Divisions			
West North Central	7	8	2
East South Central	2	2	1
New England	8	5	1
Middle Atlantic	49	43	11
Middle Atlantic (excluding New York)	5	5	2
East North Central	21	15	6
South Atlantic	56	48	22
South Atlantic (excluding Florida)	24	20	5
West South Central	51	30	42
Mountain	41	35	28
Pacific	84	65	54
Pacific (excluding California)	6	6	3
Pacific Islands	*	*	-
Atlantic Islands	-	*	-
Specific Destinations			
Los Angeles	49	27	35
New York City	41	33	9
San Francisco	39	25	13
Miami	28	20	12
Las Vegas	23	16	10
Houston	21	9	16
San Diego	20	9	16
Disneyland	15	10	8
Chicago	15	8	3
San Antonio	13	5	14
New Orleans	12	8	3
Dallas	11	5	9
Orlando	8	6	6
Boston	6	4	1
Pasadena	5	-	5
Tuscon	4	-	8
Denver	4	-	2
Disney World	3	2	1
Phoenix	3	-	5
Philadelphia	3	2	1
Grand Canyon National Park	2	2	1
Niagara Falls	2	2	-
Kansas City	1	-	-

* Less than 0.5%

3.7 Level of interest in visiting/revisiting U.S./Canada in next 5 years

As an additional measure of vacation potential, respondents were asked how interested they were in visiting or revisiting Canada and the U.S. in the next 5 years. The results were encouraging as 82% were interested in Canada, including 39% who were very interested. Even more respondents (94%) were interested in the U.S., including 61% who were very interested.

INTEREST IN VISITING CANADA OR U.S.

	Canada	U.S.
Total respondents (100%)	2000	2000
	%	%
Very interested	39	61
	82	94
Somewhat interested	43	33
Not interested	19	7

4.   SEGMENTATION OVERVIEW

One of the main objectives of this study was to segment* the target travel market on an attitudinal, motivational and product wants/needs basis. This was necessary to achieve a better understanding of international travelers so that sound information, beyond demographics and behavioral characteristics, could be gathered for marketing purposes.

A total of three separate segmentation analyses were performed for this study, each relating to a different series of ratings items as follow:

Travel philosophy
segmentation   - Based on a series of 25 agree-disagree statements relating to how people think about travel in an overall sense as well as how they prefer to travel. The statements took in a variety of issues ranging from making travel arrangements to preferences for different kinds of trips.

Benefit
segmentation   - Based on the importance ratings of a series of 30 items relating to reasons people might want to go on vacation and to experiences they might be looking for.

Product
segmentation   - Based on the importance ratings of 52 different activities, features, and amenities that are important in the selection of a vacation destination.

The main benefit of any segmentation analysis is that different segments with varying characteristics are identified, so that from a marketing standpoint it becomes possible to appeal to the actual needs and wants associated with each segment. In other words, since each segment has a different value structure a different marketing strategy is appropriate and can be developed for each one.

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* The segmentation was accomplished using a K-means cluster analysis which is a multivariate statistical analysis technique that divides the market into groups or clusters of respondents sharing similar profiles. The clusters are developed so that respondents within a given segment are as similar as possible to each other, while respondents in different segments are as different as possible from each other.

Segmentation, or cluster, analysis is typically performed on respondent ratings on a series of statement or attribute items presented to them. Accordingly, each respondent has a profile as revealed by their response to the various ratings items. Since it is a multivariate technique, cluster analysis simultaneously considers each respondent's ratings of each item (i.e. each respondent's overall pattern of response) in assigning that respondent to a particular cluster group or segment.

Furthermore, it is usual for the segments to range from high to low marketing potential, so that the main effort can be directed towards the high potential segments as a means of increasing the overall efficiency of marketing activity.

The key advantages of performing three separate segmentations as done in this study are:

1. It provides three different views of the thought processes of international travelers.

2. It becomes possible to cross-profile one set of segment solutions with each of the other two sets.

With respect to this latter point, a standard procedure in any segmentation analysis is to profile the resulting segments in terms of key demographic and behavioural data as a means of better understanding each particular group. Cross-profiling against the other sets of segment solutions gives further insight regarding the make-up of each group and enables better strategic planning for marketing development and policy purposes.

For the purposes of this report, the product segments form the marketing framework on which the analysis is based. Since these segments describe what products travelers from different countries want, they are therefore the most useful in indicating which products Canada and the U.S. should develop and market to appeal to their tastes. The other two segment approaches, travel philosophy and benefit, are also useful in their own right, and in this report they are used to profile the travelers in each of the product segments. In other words, in the same way that variables such as sex and age can be used to describe the product segments demographically, so too can travel philosophy and benefit segments be used to describe the product segments attitudinally.

This information is presented first by describing the travel philosophy and benefit segments, followed by the product segments, followed by a profile of the latter against the first two. It should be emphasized that this approach is only one of several that are possible. For example, some readers might begin with the benefit segments to form a marketing framework, and then use the travel philosophy and product segment as the profiling variables. This type of approach would be equally valid as the one used in this report, and potentially more useful for some other applications.

In the following sections of this report, an understanding of what each segment depicts is provided by presenting the statements for each segment with the highest and lowest deviations from the overall mean (for that particular statement). For example, if a segment had a mean rating of 3.5 on a specific statement and the total sample had a mean rating of 3.0, then the deviation from the overall mean for that statement would be +0.5.

These deviations show what tends to be important to a specific segment. Furthermore, deviations may show that a specific segment includes more than one type of interest. It should be noted that a high positive deviation does not necessarily mean that an attribute is important in an absolute sense, but rather that it distinguishes a particular segment in a relative sense. Similarly, an attribute of uniformly high importance to all groups would not appear as a differentiating variable in terms of deviations from the mean. The deviations therefore serve only to differentiate the segments on a relative basis.

5. TRAVEL PHILOSOPHY SEGMENTATION

As noted in the previous section, the approach taken in this report is to treat the product segmentation as the primary segmentation solution, and to use the philosophy and benefit segments as profiling variables. In order to lay the framework for this analysis, the philosophy and benefit segmentations will be discussed first.

5.1   Overview

The philosophy segmentation was based on a series of 25 statements relating to how people think about travel in an overall sense as well as how they prefer to travel. The statements took in a variety of issues ranging from making travel arrangements to preferences for different kinds of trips. Respondents were asked on a 4-point scale how much they agreed or disagreed with each statement in order to obtain an overall profile of their travel attitudes or philosophy.

Before looking at the segmentation results themselves, it is worthwhile examining the general tendencies of Mexican pleasure travelers based on their overall mean scores on the four point scale used.

Respondents seemed strongly disposed towards travel in that they thought money spent on travel was well spent (mean score of 3.7). At the same time, they believed that value for vacation money was important (3.6), that they did not have to spend a lot of money to enjoy their vacation (3.3), and that inexpensive travel to the destination was an important consideration (3.2).

In terms of other statements given high ratings, a mix of preferences among Mexican travelers was evident. Respondents indicated that they liked to have arrangements made before leaving (3.8) but also indicated that they were in favour of making arrangements as they go along (3.6). Likewise, they sometimes preferred to stay put at their destination (3.8) but also to travel from place to place rather than stay put (3.5). It is apparent that their travel philosophy is different depending on the type of trip taken.

It is clear, however, that they have a strong interest in travel based on their interest in taking short pleasure trips whenever they can (3.5), making their own travel arrangements (3.5), and going different places on each trip (3.4).

In keeping with this overall positive orientation towards travel, respondents disagreed that making arrangements was such a bother they would rather not travel (2.0), and disagreed that they'd just as soon spend on things other than travel (2.0).

(Reference: Table 32)

5.2   Segments

The segmentation analysis yielded a total of four travel philosophy segments.

FIGURE 5

TRAVEL PHILOSOPHY SEGMENTS
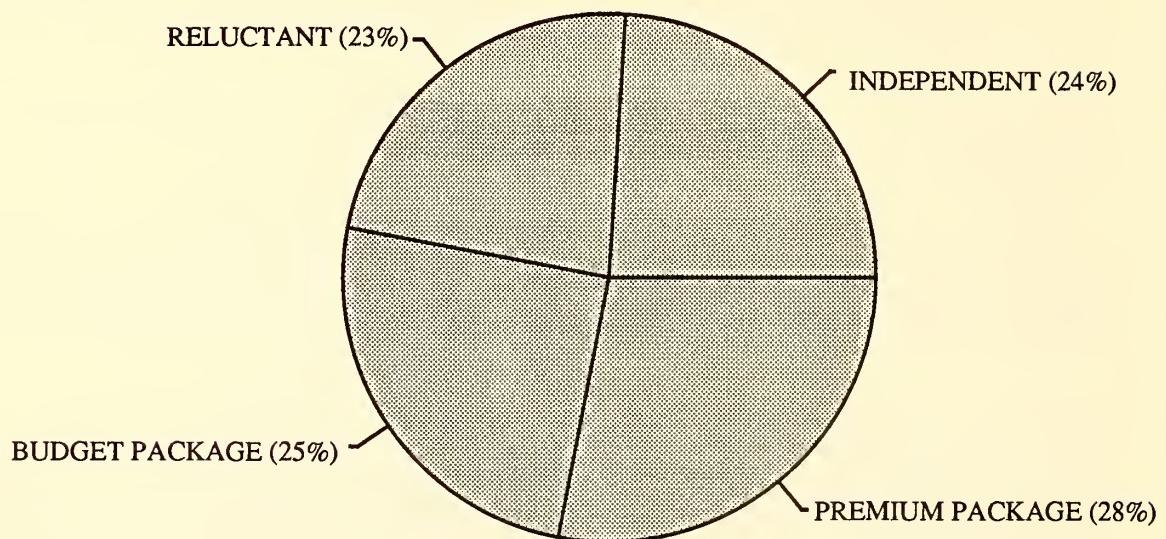
Based on total sample of 2,000 respondents

As noted earlier, these segments are best understood by examining the statements for each segment having the highest and lowest deviations from the overall mean for a statement. It should be remembered that these deviations provide a relative rather than an absolute comparison of the various segments.

The following are brief descriptions of each travel philosophy segment relative to one another:

Independent
traveler
(24%)   – This group is interested in travel that allows them the freedom to make their own travel arrangements, preferably as they go along. They like to travel from place to place on their vacation, and taking short pleasure trips whenever they can is an attractive option. They tend to stay away from package vacations and guided tours, and from having travel agents or co-travelers help with their arrangements.

Premium
Package
traveler
(28%)   - In contrast to the Independent traveler, this group has a
          preference for travel packages and guided tours. Because
          they feel making travel arrangements are a bother, they
          would rather leave the organizing and decision making to co-
          travelers and travel agents. These travelers are willing to
          spend money to enjoy a vacation and so are willing to pay for
          luxuries and the convenience associated with traveling on a
          package vacation.

Budget Package
traveler
(25%)   - This group is similar to the Premium Package traveler in
          their preference for travel packages and guided tours. These
          travelers differ, however, in the sense that they feel luxuries
          are not worth paying for. Instead, reduced fares and
          inexpensive travel are important considerations. They do not
          necessarily feel that making travel arrangements are a
          bother, so that their interest in package travel would seem to
          be its opportunity to obtain a low cost vacation.

Reluctant
traveler
(23%)   - The reluctant nature of this segment is demonstrated by their
          relative lack of interest in travel. For them, traveling is not
          necessary to enjoy a vacation and they'd just as soon spend
          money on other things. They also feel that travel
          arrangements are such a bother that they would rather not
          travel at all. When they do travel, they seem to be
          interested in a familiar destination where they have been
          before, and where people speak a language they understand.
          They are not attracted to the idea of using vacation packages
          or travel agents as a means of easing the responsibilities of
          organizing a trip.

(Reference: Table 33)

In order to provide a visual representation of the differences among travel philosophy segments, a discriminant map of the results was produced. For a description of how to interpret a discriminant map see Appendix V.

The two dimensions shown in the discriminant map accounted for 91% of the variance in the differences among the segment groups. For the sake of clarity only the most important attributes (i.e. the ones with the most discriminating ability) are shown on the map.

The two Package groups are situated on the right side of the map, their positions both influenced by the various package attributes located towards that side of the map. The Budget Package group, however, is situated more in the direction of the Budget Independent group.

The Independent group is situated in the bottom left part of the map near such attributes as "enjoy making own travel arrangements" and "make arrangements as I go along". It is also some distance away from the various package related attributes.

The Reluctant group is associated with such attributes as "choose vacation places been before", "do not have to travel to enjoy vacation", and "rather spend money on other things".

(Reference: Figure 6)

FIGURE 6

DISCRIMINANT MAP FOR TRAVEL PHILOSOPHY SEGMENTS
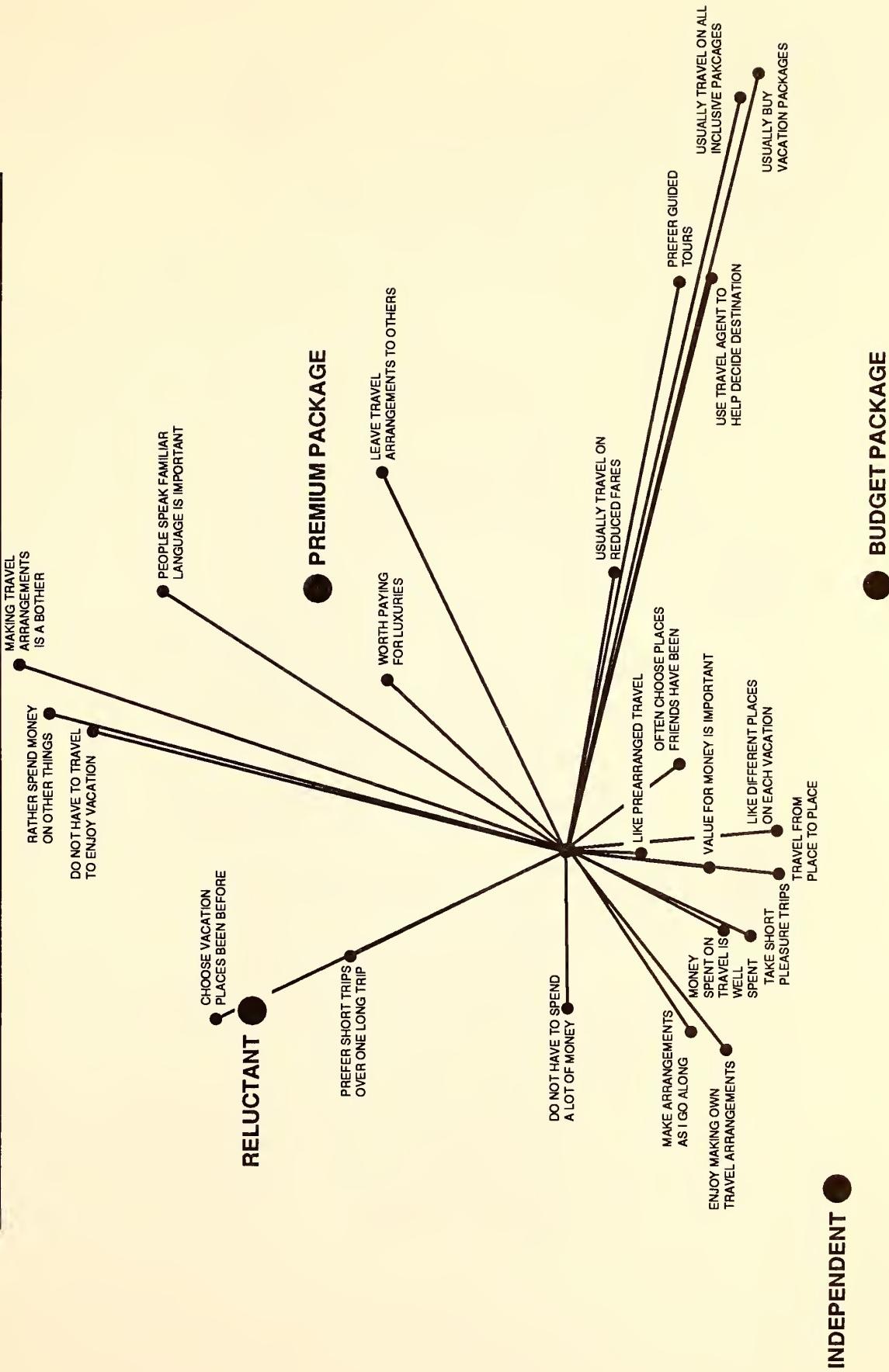
5.3 Segment profiles

With respect to the profiles of the different travel philosophy segments, the following are characteristics which disproportionately describe each segment:

Independent
traveler   - More likely than average to be:

- university educated
- higher income
- living in Hermosillo

- More likely than average to have:

- taken more trips in the past 3 years
- visited U.S. border states
- not used any sources of information in planning their trip
- taken a city trip
- taken an independent type of trip
- entered the U.S. by private car

Premium
Package
traveler   - More likely than average to have:

- visited destinations in the U.S. other than the border states
- traveled with their father or mother
- had more people in their travel party
- taken an all-inclusive guided tour
- booked their trip through a travel agent

- More likely than average to read T.V. Novelas

Budget
Package
traveler   - More likely than average to be:

- female
- 25-34 years old
- university educated
- living in Mexico City or Merida

- More likely than average to have:

- visited a destination in Mexico, but not the border states
- visited Europe or destinations in the U.S. other than the border states
- taken trips of more nights duration
- taken a touring trip

- used a travel agent or brochures/pamphlets in planning their trip
- taken an all-inclusive guided tour or a flight/accommodation package trip
- booked their trip through a travel agent
- entered the U.S. by plane
- used a rented car within the U.S.

- More likely than average to read <u>Excelsior</u>, <u>Vanidades</u>, and <u>Buen Hogar</u>

<u>Reluctant traveler</u>

- More likely than average to be:

  - male
  - primary school educated
  - lower income
  - living in Guadalajara

- More likely than average to have:

  - visited the mainland U.S., mainly the border states
  - taken a trip to visit friends and relatives
  - used friends/family in planning their trip, or not used any sources at all
  - taken an independent trip
  - traveled alone
  - stayed with friends/relatives
  - decided on their destination closer to departure (1 month or less)
  - booked their trip closer to departure (½ month or less)
  - entered the U.S. by private car
  - used a private car within the U.S.

- More likely than average to be interested in:

  - visiting the mainland U.S., mainly the border states and Texas in particular
  - visiting the West South Central census division in the U.S.
  - visiting Los Angeles in the U.S.

- More likely than average to read <u>Mecanica Popular</u>

(Reference: Tables 34 to 38)

5.4   Implications

Given the dominance of the U.S. as a vacation destination for Mexican travelers, it should not be surprising that the U.S. mainland is the destination visited most often by each of the travel philosophy groups. Each group, therefore, is likely to continue to be a source of travelers to the U.S. On the other hand, interest in Canada is quite low and presents a different marketing challenge. Of the four groups, the Budget Package and Premium Package groups are more likely than average to have visited destinations in the U.S. beyond the states bordering on Mexico. It is apparent that the promotion of vacation packages would help to increase visits to these destinations as well as to initiate more visits to Canada where levels of travel are currently low.

The Premium Package group offers particular marketing potential because of their willingness to spend money on a vacation. In other words, they are unlikely to be deterred by the added cost of traveling beyond the U.S. border states to more distant destinations in the U.S. or Canada. Due to their package orientation, this group would represent a particular target for travel agents.

The Budget Package group also should be encouraged to increase their travel to these destinations. Even though they are concerned with the costs of a vacation, they are keen travelers and receptive to the availability of all-inclusive guided tours. Low cost package travel would obviously be the key. This segment was the most likely to use a travel agent in planning and arranging their trip, so that any co-operative efforts with travel agents should be primarily targeted at this group.

The Independent group is promising in that they tend to travel somewhat more often, but they might be a difficult group to target because they are the least likely of any of the four groups to use any outside sources in planning their trip. For this group it would be more a matter of selling the destination, at which time they would find their own way there.

The Reluctant traveler is the least promising segment because of their relative lack of enthusiasm for travel. It is apparent that they travel either to visit family and friends, or to accompany a more travel-oriented partner. Either way, this would be a difficult segment to market towards.

TABLE 32

AGREEMENT WITH TRAVEL PHILOSOPHY
STATEMENTS - MEAN SCORES
(Maximum possible = 4.0, minimum possible = 1.0)

	Total
Total respondents	2000
Like to have arrangements made before leaving	3.8
Like to stay put at destination	3.8
Money on travel is well spent	3.7
Value for vacation money is important	3.6
Like to make arrangements as go along	3.6
Take short pleasure trips whenever can	3.5
Rather travel from place to place than stay put	3.5
Enjoy making own arrangements	3.5
Like to go to different places each trip	3.4
Don't have to spend a lot to enjoy vacation	3.3
Inexpensive travel to destination is important	3.2
Often choose places friends have been	2.9
Prefer a number of short trips over one long trip	2.9
Important that people speak my language	2.9
Usually choose places been before	2.7
Usually travel on reduced fares	2.7
Don't have to travel to enjoy vacation	2.5
Worth paying for luxuries	2.4
Usually buy vacation packages	2.4
Usually travel on all-inclusive packages	2.4
Prefer guided tours	2.4
Usually use travel agent to help choose destination	2.3
Prefer to leave organizing to co-traveler	2.2
Just as soon spend on things other than travel	2.0
Arrangements such a bother rather not travel	2.0

TABLE 33

TRAVEL PHILOSOPHY SEGMENTS

	Deviation from overall statement mean
INDEPENDENT (24%)	
Enjoy making own travel arrangements	+0.3
Take short pleasure trips whenever can	+0.3
Like to make arrangements as I go along	+0.3
Usually travel on reduced fares	-0.4
Prefer to leave travel arrangements to co-traveler	-0.5
Usually use travel agent to help choose destination	-0.5
Prefer to go on guided tours	-0.6
Making travel arrangements are a bother	-0.6
Rather spend money on other things	-0.6
Do not have to travel to enjoy vacation	-0.6
People speak familiar language is important	-0.7
Usually travel on all-inclusive package vacations	-0.8
Usually buy vacation packages	-0.8
PREMIUM PACKAGE (28%)	
Prefer to leave the organizing to co-traveler	+0.6
Worth paying for luxuries	+0.6
Making travel arrangements are a bother	+0.6
Usually buy vacation packages	+0.5
Usually use a travel agent to help choose destination	+0.5
Usually travel on all-inclusive packages	+0.4
Prefer to go on guided tours	+0.4
Rather spend money on other things	+0.3
People speak familiar language is important	+0.3
Don't have to spend a lot of money to enjoy vacation	-0.3
Like to make arrangements as I go along	-0.3
Enjoy making own travel arrangements	-0.3

TABLE 33 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS

	Deviation from overall statement mean
BUDGET PACKAGE (25%)	
Usually travel on all-inclusive packages	+0.9
Usually buy vacation packages	+0.9
Prefer guided tours on overseas trips	+0.6
Use travel agent to help decide destination	+0.5
Usually travel on reduced fares	+0.5
Inexpensive travel to destination is important	+0.2
Prefer several short trips over one long trip	-0.3
Worth paying for luxuries	-0.3
Making travel arrangements are a bother	-0.4
Choose vacation places been before	-0.5
RELUCTANT (23%)	
Do not have to travel to enjoy vacation	+0.6
Rather spend money on other things	+0.5
People speak familiar language is important	+0.4
Choose vacation places been before	+0.4
Making travel arrangements are a bother	+0.3
Prefer short trips over one long trip	+0.3
Don't have to spend a lot to enjoy vacation	+0.3
Prefer guided tours	-0.5
Usually travel on all-inclusive packages	-0.6
Use travel agent to help decide destination	-0.6
Usually buy vacation packages	-0.7

TABLE 34

TRAVEL PHILOSOPHY SEGMENTS
DEMOGRAPHICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Sex					
Male	50	51	49	45	(56)
Female	50	49	51	(55)	44
Age					
18 – 24 years	31	31	33	28	32
25 – 34 years	24	27	20	(30)	20
35 – 44 years	20	19	20	20	20
45 – 54 years	12	13	14	10	11
55 – 64 years	8	8	6	8	9
65 years or over	6	3	7	4	8
Marital status					
Single	41	43	41	39	40
Married	55	54	54	57	54
Living together	*	*	-	*	-
Divorced/separated/widowed	2	2	2	2	2
Other	3	2	3	2	4
Occupation					
Owner	3	4	3	3	3
Manager/executive	11	12	10	13	11
Professional/technical	22	22	22	25	19
Clerical/sales	12	13	12	13	11
Skilled worker	4	4	4	4	6
Unskilled worker	1	1	*	*	1
Student	18	17	20	16	18
Retired	4	3	3	3	6
Homemaker	24	24	24	23	23
Other	1	1	1	*	1
City					
Mexico City	40	38	42	(47)	31
Guadalajara	16	18	11	13	(22)
Monterrey	16	15	19	13	18
Hermosillo	9	(15)	6	8	9
Merida	9	7	9	(14)	7
Juarez	10	7	13	6	13

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 34 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
DEMOGRAPHICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Education					
Elementary school	6	5	6	3	⑫
Junior high school	7	6	9	7	7
Technical/commercial	15	13	16	16	14
Senior high school	22	20	24	21	23
University	50	㊺	45	�54	44
Life cycle					
Living alone	2	1	3	1	2
Living with one adult	9	9	8	11	10
Single with children	23	23	24	21	25
Couple with children	42	44	41	44	37
Other	24	22	24	23	26
Living arrangement					
Live alone	2	1	3	1	2
Live with children	66	67	67	66	63
Live without children	32	32	30	33	35
Mean no. of adults 18 years or over	3.2	3.2	3.2	3.2	3.3
Whether any children under 18 years in household					
Yes	66	67	67	66	63
No	34	33	33	34	37
Household income in pesos (1987 financial year)					
11,000,000 or less	26	23	22	27	㉞
11,000,001 - 17,000,000	21	19	20	21	23
17,000,001 - 25,000,000	19	20	22	20	16
Over 25,000,000	25	㉚	27	25	18
Refused	9	8	10	8	10

Note: Circled numbers represent those referred to in the main text

TABLE 35

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Mean no. of 4+ night pleasure trips in past 3 years	8.0	(9.7)	7.7	7.4	7.3
Destinations visited in past 3 years**					
Short haul					
- Mexico	88	88	87	(92)	84
- Central America	3	5	2	3	3
- Border states	58	(70)	58	(46)	60
Long haul					
- Elsewhere	38	42	38	42	28
Destinations visited on two most recent trips outside Mexico***					
U.S. total	(84)	(85)	(85)	(77)	(90)
Border states	63	67	62	51	73
Elsewhere in mainland U.S.	20	17	(23)	(25)	17
Hawaii/Guam/Samoa	1	1	1	1	*
Europe	7	6	6	(11)	5
Canada	3	4	2	4	2
West Indies/Caribbean	2	1	2	3	1
South America	2	1	3	3	1
Central America	1	1	1	1	1
Near/Middle East	*	*	*	1	*
Asia	*	1	*	1	-

*   Less than 0.5%

**   Based on 1,880 <u>respondents</u> who had actually taken at least one such trip

*** Based on 2,333 such <u>trips</u> taken by respondents

Note: Circled numbers represent those referred to in the main text

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

| | | TRAVEL PHILOSOPHY SEGMENT | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
One destination outside Mexico most like to visit					
Europe	41	42	43	42	38
U.S. total	28	26	27	24	34
Border states	13	10	13	10	19
Elsewhere in mainland U.S.	12	13	11	11	13
Hawaii/Guam/Samoa	3	3	4	3	2
Asia	9	10	9	9	6
Canada	8	6	7	10	8
South America	5	4	5	6	5
Africa	3	3	3	1	2
West Indies/Caribbean	3	4	2	4	2
Near/Middle East	2	3	3	2	3
Australia/New Zealand	1	2	1	1	1
Central America	*	1	–	1	1

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents took trip outside Mexico (100%)	1442	392	398	334	316
	%	%	%	%	%
Mean no. of nights away on trip	22.1	20.2	18.6	(26.4)	24.4
Season trip was taken					
Winter	15	16	15	14	16
Spring	16	13	15	18	17
Summer	44	47	44	46	40
Fall	25	24	26	22	28
Type of trip (Two most recent)					
Touring trip	39	35	44	(48)	29
Visit friends and relatives	32	33	29	22	(45)
Combined business and pleasure	13	14	13	13	13
City	8	(11)	5	6	6
Resort	4	3	5	4	2
Exhibition, special event or theme park	3	3	3	5	3
Outdoor trip	1	1	1	1	1
Cruise	1	1	1	1	*
People traveled with					
Wife/husband/girl friend/boy friend	37	39	35	41	32
Other relatives	33	31	37	28	35
Child(ren)	23	26	22	24	19
Traveled alone	21	23	15	20	(27)
Father/mother	17	18	(21)	13	16
Friends	12	11	15	15	7
Organized group/club/etc.	2	1	2	1	1
Business associates/colleagues	1	*	2	2	1
Mean no. of people in travel party	3.4	3.3	(3.7)	3.4	3.2
Mean no. of children under 18 in travel party	0.9	1.0	1.0	0.8	0.9

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

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TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

		TRAVEL PHILOSOPHY SEGMENT			
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents took trip outside Mexico (100%)	1442	392	398	334	316
	%	%	%	%	%
Sources of information used in planning					
Travel agent	32	24	38	(47)	17
Friends/family	31	27	29	31	(39)
Brochures/pamphlets	8	7	9	(13)	5
Airline	6	6	4	5	8
Newspaper/magazine article	3	1	3	5	1
Embassy/consulate	2	2	1	1	2
Government tourism office/board	2	2	2	2	1
Books/library	1	1	*	2	1
Tour operator/company	1	–	1	2	1
Advertisements	1	2	2	2	*
Clubs/associations	1	1	1	*	2
Other	1	1	1	1	1
None	36	(45)	30	27	(41)
Trip type					
Independent	72	(87)	65	53	(91)
All-inclusive guided tour	13	4	(18)	(20)	4
Flight and accommodation package only	13	8	13	(22)	4
Guided tour only	3	1	3	5	1
Where booked					
Stayed with friends/relatives	47	51	39	37	(62)
Travel agent	38	30	(44)	(54)	25
Direct with hotel etc.	19	21	19	16	18
Airline	17	21	16	12	18
Tour company/holiday company	1	–	1	2	–
Other	5	5	5	5	6
Did not book accommodation in advance	12	12	11	9	16

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

Pleasure Travel Markets to North America - Mexico 1988

TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents took trip outside Mexico (100%)	1442	392	398	334	310
	%	%	%.	%	%
Number of months before leaving - decided on destination					
1 month or less	64	61	64	61	⑦①
Over 1 month to 2 months	11	11	11	10	10
Over 2 months to 3 months	7	9	8	9	4
Over 3 months to 4 months	4	5	4	4	2
Over 4 months	15	14	13	17	14
Number of months before leaving - trip was booked					
½ month or less	73	72	72	65	㊙⑭
Over ½ month to 1 month	17	17	17	24	10
Over 1 month to 2 months	5	5	6	5	3
Over 2 months	6	6	5	6	4
Total trips to U.S. taken by respondents (100%)	1953	570	543	392	447
	%	%	%	%	%
Mode of transportation used to enter U.S.					
Plane	47	43	51	㊶	40
Private car	42	㊅⑦	38	36	㊻
Bus	8	8	9	6	10
Rented car	1	1	1	1	1
Train	1	*	1	1	1
Camper or RV	1	1	*	1	1
Boat	*	-	-	*	-
Mode of transportation used within U.S.					
Private car	69	73	65	60	㊛
Rented car	18	18	21	㉔	11
Public transportation (within cities)	11	8	14	13	11
Bus (between cities)	4	3	4	8	3
Plane	3	2	5	4	2
Camper or RV	1	1	1	2	1
Train	1	1	1	1	1
Boat	1	-	1	1	1

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

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TABLE 35 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TRAVEL CHARACTERISTICS

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total trips to Canada taken by respondents (100%)	68	25+	15+	19+	8+
	%	%	%	%	%
Mode of transportation used to enter Canada					
Plane	69	69	77	54	87
Bus	20	16	18	36	-
Private car	9	11	-	11	13
Camper or RV	2	3	5	-	-
Mode of transportation used within Canada					
Private car	45	59	31	31	63
Bus (between cities)	38	21	42	59	37
Rented car	19	28	22	11	-
Public transportation (within cities)	17	21	10	17	18
Plane	9	19	5	4	-
Train	7	4	5	7	17
Camper or RV	5	6	10	-	-
Boat	2	-	-	-	19

+ Note: Small base
Note: Circled numbers represent those referred to in the main text

TABLE 36

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

| | | TRAVEL PHILOSOPHY SEGMENT | | | |
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Provinces and Territories					
Newfoundland/Labrador	6	6	7	4	6
P.E.I.	1	1	1	1	2
Nova Scotia	2	2	2	3	1
New Brunswick	1	1	1	1	-
Quebec	74	72	73	77	73
Ontario	78	78	77	79	77
Manitoba	6	6	8	5	5
Saskatchewan	6	5	8	4	7
Alberta	22	23	24	18	23
British Columbia	36	40	33	37	33
Yukon	6	5	6	6	7
Northwest Territories	2	1	2	2	4
Specific Destinations					
Montreal	49	51	48	51	44
Quebec City	42	39	41	45	43
Niagara Falls	29	31	27	33	26
Toronto	23	23	23	22	22
Ottawa	21	23	21	23	18
Vancouver	18	22	16	17	17
Calgary	12	14	14	9	12
Vancouver Island	11	12	11	13	9
Regina	4	3	5	1	4
Victoria	3	4	3	4	3

Note: Circled numbers represent those referred to in the main text

TABLE 37

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	Total	TRAVEL PHILOSOPHY SEGMENT			
		Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Top States					
California	62	58	60	63	65
New York	39	43	39	43	30
Florida	33	34	33	36	29
Texas	21	17	23	17	(26)
Nevada	20	19	19	22	20
Washington D.C.	17	18	17	18	14
Louisiana	9	9	8	10	8
Illinois	9	11	9	8	8
Arizona	7	8	5	7	8
Colorado	7	8	8	5	7
Pennsylvania	5	6	6	4	4
Washington	4	6	3	4	5
Massachusetts	4	5	3	4	4
8 Travel Regions					
Travel South	42	43	42	46	38
Visit U.S. West	75	75	73	75	79
New England	5	6	4	5	5
Old West Trail Foundation	4	5	5	3	5
America's Heartland	14	15	14	14	13
Foremost West	17	18	16	15	18
George Washington Country	21	23	21	22	18
Great Lakes	18	18	17	18	17

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 37 (cont'd)

TRAVEL PHILOSOPHY SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

| | Total | TRAVEL PHILOSOPHY SEGMENT | | | |
		Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
11 Census Divisions					
West North Central	8	8	10	7	6
East South Central	2	1	2	2	2
New England	5	6	4	5	5
Middle Atlantic	43	46	44	47	34
Middle Atlantic (excluding N.Y.)	5	6	6	5	5
East North Central	15	16	15	15	15
South Atlantic	48	48	49	52	42
South Atlantic (excluding Florida)	20	21	20	21	18
West South Central	30	26	31	28	(35)
Mountain	35	35	34	35	37
Pacific	65	62	63	67	69
Pacific (excluding California)	6	8	4	6	7
Pacific Islands	*	1	*	*	*
Atlantic Islands	-	-	-	-	-
Miscellaneous					
New York City	33	36	33	37	25
Los Angeles	27	24	27	26	(32)
San Francisco	25	26	24	27	23
Miami	20	19	21	21	19
Las Vegas	16	14	16	19	16
Disneyland	10	9	12	10	11
Houston	9	7	9	7	11
San Diego	9	9	9	7	13
Chicago	8	10	8	7	8
New Orleans	8	8	7	9	7
Orlando	6	6	6	7	3
Dallas	5	2	7	3	7
San Antonio	5	4	6	4	6
Boston	4	5	3	4	4

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 38

TRAVEL PHILOSOPHY SEGMENTS
MEDIA READERSHIP

		TRAVEL PHILOSOPHY SEGMENT			
	Total	Independent traveler	Premium Package traveler	Budget Package traveler	Reluctant traveler
Total respondents (100%)	2000	484	553	495	466
	%	%	%	%	%
Top 5 daily newspapers					
Excelsior	26	25	25	(31)	21
El Universal	16	17	17	17	13
El Informador	11	14	8	11	15
Novedades	10	7	11	11	10
El Norte, Edicion el Sol	10	10	12	7	10
Top 5 weekly magazines					
Proceso	23	26	23	24	21
Impacto	23	24	21	23	22
Time	17	20	16	20	13
T.V. Novelas	15	15	(19)	15	12
Siempre	10	10	10	11	10
Top 5 monthly magazines					
Selecciones	63	64	62	65	59
Contenido	21	24	21	20	20
Vanidades	20	19	19	(25)	17
Mecanica Popular	12	11	11	10	(17)
Buen Hogar	12	11	11	(15)	11

Note: Circled numbers represent those referred to in the main text

6. BENEFIT SEGMENTATION

6.1 Overview

This segmentation was based on the importance ratings given to a series of 30 items relating to reasons why people might want to go on a vacation and to experiences sought.

Topping the list of benefits for Mexican travelers was the desire to have fun and be entertained (3.9). Other attributes given high ratings related more to expanding their horizons. These attributes included learning new things, increasing knowledge (3.8), seeing as much as possible in the time available (3.8), seeing and experiencing a foreign destination (3.7), traveling through places important in history (3.6), experiencing new and different lifestyles (3.5) and trying new foods (3.4).

Just getting a change was another important benefit based on the ratings given to escaping from the ordinary (3.6) and getting a change from a busy job (3.5).

Being physically active (3.5) was also important, as were attributes offering a sense of safety and familiarity e.g. traveling to places where they feel safe and secure (3.5), being together as a family (3.5), and feeling at home away from home (3.4).

While roughing it (2.4) was not particularly appealing to respondents, neither was indulging in luxury (2.2). The lowest rating of all was given to doing nothing at all (1.4).

(Reference: Table 39)

6.2   Segments

A total of four benefit segments were identified in the analysis.

FIGURE 7

BENEFIT SEGMENTS

FAMILY (17%)

SOCIAL GETAWAY (24%)

SPORTS AND
ADVENTURE (35%)

ADVENTURE (25%)
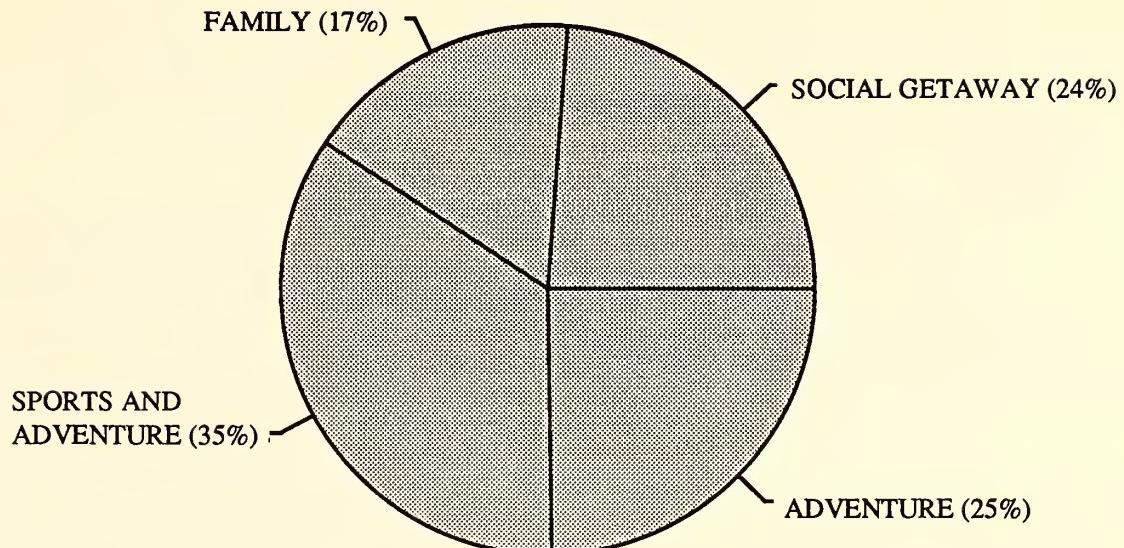
Based on total sample of 2,000 respondents

The following descriptions indicate the ways in which each group is different from the average:

Social Getaway
traveler
(24%)

- This group has a social orientation to travel in that they are interested in visiting friends and family on their vacation. They want to be together as a family and to feel at home away from home. This social orientation provides a means of getting away from the demands of home. This group is definitely not interested in sports activities and adventure.

Adventure
traveler
(25%)

- Family related activities are of little interest to this group of travelers. They prefer to find excitement and adventure as opposed to traveling to places where they feel safe and secure. Unlike the Social Getaway traveler, they are not

interested in reliving past good times but instead want to experience new and different lifestyles. They want to be free to act the way they feel. They are similar to the Social Getaway traveler, however, in the sense that they have little interest in watching or participating in sports.

Sports and Adventure traveler (35%)

- This segment is similar to the Adventure segment in terms of sharing an interest in thrills, adventure, and generally being free to act the way they feel. Whereas the Adventure group has little interest in sports activities, however, this group is interested in sports as a way of challenging themselves.

Family traveler (17%)

- This group is similar to the Social Getaway segment by virtue of having a strong family orientation. Visiting friends and relatives, being together as a family, or visiting places their family came from are what these travelers are looking for. Unlike the Social Getaway segment, however, they are less concerned with escaping their present situation and reliving the past. They have no need to rediscover themselves, and wish to be with family and friends for their own sake.

(Reference: Table 40)

Again in order to provide a visual summary of the differences among the segments a discriminant map was produced. The two dimensions shown on the map accounted for (77%) of the variance in the differences among the segment groups. It should again be noted that only the most important attributes (the ones with the most discriminating ability) are shown on the map.

As would be expected, the Action segment is strongly associated with the attributes "participating in sports", "being physically active" and "watching sporting events". The Social Safety group is in turn strongly associated with a variety of family related attributes, as well as "safety and security in destination".

The Experiential group on the left side of the map lies in the direction of such attributes as "experiencing new/different lifestyles", "escaping from the ordinary", and "increasing knowledge, learning new things". The relatively short length of these lines, however, indicates that they were not strong in terms of discriminating between the four groups. The Experiential group is also strongly dissociated with sports and family related items.

Luxury travelers are also dissociated with sports and family related items, but less strongly. Getting away and doing nothing at all are important to this group.

Both the Adventure group and the Sports and Adventure group are associated with such attributes as the right side of the map as "being daring and adventuresome", "finding thrills and excitement", and "being free to act the way I feel". The Sports and Adventure group, however, is positioned more to the top of the map near the two sports related attributes.

Both the Family and the Social Getaway groups are associated with the various attributes relating to friends and family on the left side of the map. The Social Getaway group, however is more interested in "getting away from the demands of home", and slightly less interested in sports.

(Reference: Figure 8)

FIGURE 8

DISCRIMINANT MAP FOR BENEFIT SEGMENTS
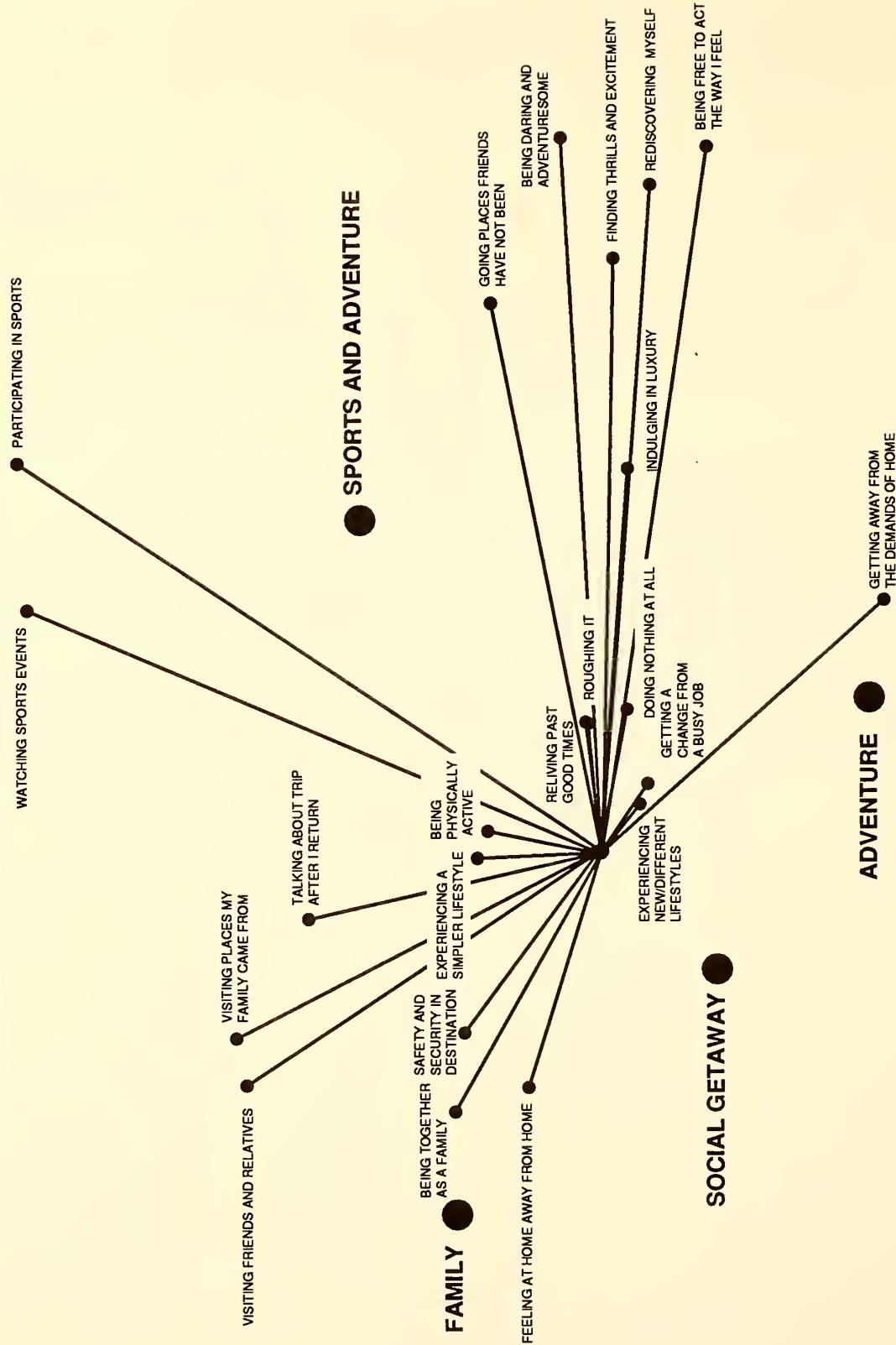
6.3   Segment profiles

The following characteristics disproportionately describe each segment:

Social Getaway
traveler   - More likely than average to be:

- female
- older (45 years or more)
- married
- a homemaker or retired
- living in Monterrey
- primary, junior college or trade/technical/business school educated
- a couple with children
- a lower income

- More likely than average to have:

- taken a trip to visit friends and relatives
- traveled with a spouse/girl friend/boy friend, or children
- booked with a travel agent

- More likely than average to be interested in:

- visiting the mainland U.S., particularly the border states
- visiting Quebec City in Canada
- visiting San Antonio in the U.S.

- More likely than average to read El Informador, El Norte (Edicion el Sol), Vanidades, and Buen Hogar

Adventure
traveler   - More likely than average to be:

- between 18 and 24 years old
- single
- a manager/executive
- employed in a professional/technical occupation
- living in Mexico City
- university educated
- higher income

- More likely than average to have:

- taken more pleasure trips in the past 3 years
- taken a long haul trip
- visited Europe or a U.S. long haul destination
- taken a trip of more nights duration
- taken a touring type of trip
- traveled alone
- used a travel agent in planning their trip
- booked with a travel agent or directly with the hotel
- entered the U.S. by plane
- used a rented car within the U.S.

- More likely than average to be interested in:

    - visiting Montreal and Vancouver Island in Canada
    - visiting New York (mainly New York City), Florida and Louisiana in the U.S.
    - visiting the Travel South travel region in the U.S.

- More likely than average to read Excelsior and Time

Sports and Adventure traveler

- More likely than average to be:

    - male
    - younger (18-24 years of age)
    - single
    - a student or in a clerical/sales occupation
    - single with children
    - high school educated

- More likely than average to have:

    - visited a U.S. long haul destination
    - taken a trip of more nights duration
    - traveled with friends that were not girl or boy friends

- More likely than average to read Time

Family traveler

- More than likely than average to be:

    - older (55-64 years of age)
    - a homemaker
    - living in Guadalajara or Hermosillo

- More likely than average to have:

    - visited the U.S. border states
    - taken a trip to visit friends and relatives
    - traveled with wife/husband/girl friend/boy friend or children
    - not used any sources of planning information
    - stayed with friends and relatives
    - entered the U.S. by private car
    - used a private car within the U.S.
- More likely than average to be interested in:

    - visiting the U.S., mainly the U.S. border states
    - visiting Vancouver in Canada

- More likely than average to read El Informador, Impacto and Selecciones

(Reference: Tables 41 to 45)

6.4   Implications

The two potentially strongest markets that may be influenced by promotional activities are the <u>Sports and Adventure</u>, and the <u>Adventure</u> segments. Both of these groups tend to be young and single, and as such may be more interested in venturing further from home to destinations they have not visited before. Since the Sports and Adventure group is predominately male and interested in sports as well as adventure and excitement, one would suspect that an increased awareness of North America's outdoor and sports opportunities, such as skiing, mountain climbing and white water rafting, would draw more of this group to the U.S. and Canada.

The Adventure segment is a wealthier, well-educated group that is more evenly split between males and females. They have little interest in sports but are adventurous in the sense that they would like to experience foreign destinations. They did express an interest in visiting New York and Montreal which suggests that it may be necessary to position these and other large cities in North America as exciting destinations offering different cultures and lifestyles.

Because their main motive for travel is to visit friends and relatives, the <u>Social Getaway</u> and <u>Family</u> segments are the two most difficult groups to influence from a marketing standpoint. In other words, any travel decisions would be influenced by where their friends and relatives are actually located, a situation over which a marketer would have little control.

TABLE 39

IMPORTANCE OF BENEFIT STATEMENTS - MEAN SCORES
(Maximum possible = 4.0, minimum possible = 1.0)

	Total
Total respondents	2000
Having fun/being entertained	3.9
Learning new things, increasing knowledge	3.8
Seeing as much as possible in the time available	3.8
Seeing and experiencing a foreign destination	3.7
Escaping from the ordinary	3.6
Traveling through places important in history	3.6
Experiencing new and different lifestyles	3.5
Getting a change from a busy job	3.5
Being physically active	3.5
Traveling to places feel safe and secure	3.5
Being together as a family	3.5
Trying new foods	3.4
Feeling at home away from home	3.4
Meeting people with similar interests	3.3
Being free to act the way I feel	3.1
Experiencing a simpler lifestyle	3.1
Visiting friends and relatives	3.1
Finding thrills and excitement	3.0
Talking about the trip after I return home	3.0
Visiting places family came from	3.0
Rediscovering myself	2.9
Reliving past good times	2.9
Getting away from the demands of home	2.8
Watching sports events	2.7
Being daring and adventuresome	2.6
Participating in sports	2.5
Going places friends haven't been	2.5
Roughing it	2.4
Indulging in luxury	2.2
Doing nothing at all	1.4

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TABLE 40

TRAVEL BENEFIT SEGMENTS

	Deviation from overall statement mean
SOCIAL GETAWAY (24%)	
Getting away from the demands of home	+0.5
Reliving past good times	+0.4
Visiting friends and relatives	+0.3
Visiting places my family came from	+0.3
Being together as a family	+0.2
Feeling at home away from home	+0.2
Finding thrills and excitement	-0.6
Being daring and adventuresome	-0.7
Watching sporting events	-0.8
Participating in sports	-0.8
ADVENTURE (25%)	
Finding thrills and excitement	+0.4
Being daring and adventuresome	+0.3
Being free to act the way I feel	+0.3
Experiencing new and different lifestyles	+0.2
Feeling at home away from home	-0.3
Reliving past good times	-0.3
Going places friends have not been	-0.3
Being together as a family	-0.4
Traveling to places feel safe and secure	-0.4
Watching sporting events	-0.5
Participating in sports	-0.5
Talking about trip after I return	-0.6
Visiting places family came from	-0.8
Visiting friends and relatives	-0.8

TABLE 40 (cont'd)

TRAVEL BENEFIT SEGMENTS

	Deviation from overall statement mean
SPORTS AND ADVENTURE (35%)	
Participating in sports	+0.9
Watching sporting events	+0.8
Being daring and adventuresome	+0.6
Going places friends have not been	+0.6
Rediscovering myself	+0.5
Being free to act the way I feel	+0.4
Finding thrills and excitement	+0.4
Feeling at home away from home	-0.1
Getting away from the demands of home	-0.1
FAMILY (17%)	
Visiting friends and relatives	+0.3
Being together as a family	+0.3
Feeling at home away from home	+0.3
Visiting places my family came from	+0.2
Traveling to places feel safe and secure	+0.2
Reliving past good times	-0.4
Indulging in luxury	-0.5
Finding thrills and excitement	-0.5
Being daring and adventuresome	-0.6
Going places friends have not been	-0.5
Being free to act the way I feel	-0.9
Rediscovering myself	-1.1

TABLE 41

BENEFIT SEGMENTS - DEMOGRAPHICS

		BENEFIT SEGMENT			
	Total	Social Getaway	Adven-ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Sex					
Male	50	26	56	(64)	46
Female	50	(74)	44	36	54
Age					
18 - 24 years	31	10	(38)	(44)	24
25 - 34 years	24	22	24	25	25
35 - 44 years	20	22	21	16	22
45 - 54 years	12	(19)	11	8	12
55 - 64 years	8	13	5	4	(11)
65 years or over	6	14	2	3	5
Marital status					
Single	41	16	(50)	(55)	34
Married	55	(75)	48	43	60
Living together	*	*	-	*	-
Divorced/separated/widowed	2	2	2	1	2
Other	3	7	*	1	4
Occupation					
Owner	3	2	3	4	4
Manager/executive	11	6	(15)	13	10
Professional/technical	22	19	(29)	19	22
Clerical/sales	12	7	14	(16)	11
Skilled worker	4	4	2	6	4
Unskilled worker	1	-	1	1	*
Student	18	6	19	(27)	15
Retired	4	8	2	2	4
Homemaker	24	49	14	10	(29)
Other	1	*	1	1	*
City					
Mexico City	40	29	(55)	42	27
Guadalajara	16	21	5	15	(25)
Monterrey	16	(21)	11	19	10
Hermosillo	9	7	7	5	(24)
Merida	9	13	11	7	7
Juarez	10	9	11	11	6

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 41 (cont'd)

BENEFIT SEGMENTS - DEMOGRAPHICS

	Total	BENEFIT SEGMENT			
		Social Getaway	Adventure	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Education					
Elementary school	6	13	2	4	8
Junior high school	7	11	6	6	7
Technical/commercial	15	23	8	12	17
Senior high school	22	16	22	28	19
University	50	37	62	51	49
Life cycle					
Living alone	2	2	3	1	2
Living with one adult	9	13	8	7	11
Single with children	23	9	26	34	19
Couple with children	42	53	36	35	46
Other	24	23	26	23	23
Living arrangement					
Live alone	2	2	3	1	2
Live with children	66	64	63	70	66
Live without children	32	34	34	29	32
Mean no. of adults 18 years or over	3.2	3.0	3.3	3.4	3.1
Whether any children under 18 years in household					
Yes	66	64	63	70	66
No	34	36	37	30	34
Household income in pesos (1987/1988 financial year)					
11,000,000 or less	26	31	21	26	27
11,000,001 - 17,000,000	21	22	18	20	22
17,000,001 - 25,000,000	19	19	19	20	21
Over 25,000,000	25	16	32	26	23
Refused	9	11	9	9	7

Note: Circled numbers represent those referred to in the main text

TABLE 42

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

| | Total | BENEFIT SEGMENT | | | |
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Mean no. of 4+ night pleasure <u>**trips in past 3 years**</u>	<u>8.0</u>	<u>7.0</u>	(9.3)	<u>7.9</u>	<u>7.8</u>
Destinations visited <u>**in past 3 years**</u>**					
Short haul - Mexico	88	82	91	90	87
- Central America	3	3	5	3	2
- Border states	58	61	56	54	(66)
Long haul - Elsewhere	38	36	(49)	32	36
Destinations visited on two <u>**most recent trips outside Mexico**</u>***					
U.S. total	84	86	79	86	88
Border states	63	68	53	63	(73)
Elsewhere in mainland U.S.	20	18	(24)	(23)	15
Hawaii/Guam/Samoa	1	*	1	*	1
Europe	7	7	(11)	5	5
Canada	3	3	3	3	3
South America	3	2	2	2	2
West Indies/Caribbean	2	2	3	1	1
Central America	1	1	2	2	1
Near/Middle East	*	1	*	1	*
Asia	*	–	1	*	*

*   Less than 0.5%

** Based on 1,880 <u>respondents</u> who had actually taken at least one such trip

*** Based on 2,333 such <u>trips</u> taken by respondents

Note: Circled numbers represent those referred to in the main text

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TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	BENEFIT SEGMENT			
		Social Getaway	Adven-ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
One destination outside Mexico most like to visit					
Europe	41	36	44	44	41
U.S. total	28	34	21	26	33
Border states	13	20	7	11	17
Elsewhere in mainland U.S.	12	12	12	13	9
Hawaii/Guam/Samoa	3	2	3	3	2
Asia	9	9	11	7	8
Canada	8	9	8	8	6
South America	5	4	5	6	4
Africa	3	1	3	3	1
West Indies/Caribbean	3	2	4	3	5
Near/Middle East	2	4	1	2	3
Australia/New Zealand	1	1	1	1	*
Central America	*	1	1	-	1

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	BENEFIT SEGMENT			
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents took trip outside Mexico (100%)	1442	357	363	455	264
	%	%	%	%	%
Mean no. of nights away on trip	22.1	17.2	(26.3)	(24.5)	19.0
Season trip was taken					
Winter	15	13	15	18	15
Spring	16	16	16	16	15
Summer	44	46	47	43	42
Fall	25	26	23	23	29
Type of trip (Two most recent)					
Touring trip	39	39	(44)	39	32
Visit friends and relatives	32	(38)	20	30	(43)
Combined business and pleasure	13	10	16	16	10
City	8	7	9	5	11
Resort	4	2	6	4	2
Exhibition, special event or theme park	3	3	4	4	2
Outdoor trip	1	1	1	1	*
Cruise	1	*	2	2	*
People traveled with					
Wife/husband/girl friend/boy friend	37	(50)	33	26	(42)
Other relatives	33	35	31	33	32
Child(ren)	23	(33)	16	17	(28)
Traveled alone	21	15	(28)	23	16
Father/mother	17	9	19	21	19
Friends	12	10	12	(17)	7
Organized group/club/etc.	2	1	2	2	1
Business associates/colleagues	1	*	1	1	2
Mean no. of people in travel party	3.4	3.6	3.3	3.4	3.4
Mean no. of children under 18 in travel party	0.9	1.1	0.8	0.8	0.9

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

| | Total | BENEFIT SEGMENT | | | |
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents took trip outside Mexico (100%)	1442	357	363	455	264
	%	%	%	%	%
Sources of information used in planning					
Travel agent	32	33	(40)	29	25
Friends/family	31	30	31	33	31
Brochures/pamphlets	8	9	10	8	6
Airline	6	5	5	7	7
Newspaper/magazine article	3	2	3	2	2
Embassy/consulate	2	1	3	1	2
Government tourism office/board	2	2	1	1	2
Books/library	1	*	1	2	1
Tour operator/company	1	1	1	1	*
Advertisements	1	1	1	2	2
Clubs/associations	1	1	1	1	1
Other	1	*	2	1	1
None	36	36	28	37	44
Trip type					
Independent	84	81	81	85	88
All-inclusive guided tour	7	8	8	6	6
Flight and accommodation package only	7	8	9	6	5
Guided tour only	3	3	2	3	1
Where booked					
Stayed with friends/relatives	47	50	33	50	(55)
Travel agent	38	(44)	(45)	34	29
Airline	17	14	17	19	17
Direct with hotel etc.	17	20	23	15	15
Tour company/holiday company	1	*	1	1	-
Other	5	4	6	7	3
Did not book accommodation in advance	12	8	14	13	14

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

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TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	BENEFIT SEGMENT			
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents (100%)	2000	357	363	455	264
	%	%	%	%	%
Number of months before leaving - decided on destination					
1 month or less	64	62	64	69	57
Over 1 month to 2 months	11	13	9	9	13
Over 2 months to 3 months	7	7	6	8	11
Over 3 months to 4 months	4	4	4	3	4
Over 4 months	15	15	17	12	16
Number of months before leaving - trip was booked					
½ month or less	73	73	66	75	77
Over ½ month to 1 month	17	19	19	16	15
Over 1 month to 2 months	5	3	6	5	5
Over 2 months	6	4	9	5	3
Total trips to U.S. taken by respondents (100%)	1953	475	468	629	377
	%	%	%	%	%
Mode of transportation used to enter U.S.					
Plane	47	46	(55)	48	37
Private car	42	42	38	39	(53)
Bus	8	9	4	10	9
Rented car	1	1	1	1	1
Train	1	1	1	*	1
Camper or RV	1	1	1	1	*
Boat	*	-	*	-	-
Mode of transportation used within U.S.					
Private car	69	69	59	70	(80)
Rented car	18	16	(28)	18	11
Public transportation (within cities)	11	13	12	12	7
Bus (between cities)	4	6	4	4	3
Plane	3	3	5	2	2
Camper or RV	1	2	1	2	2
Train	1	1	1	1	*
Boat	1	-	1	1	-

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

Pleasure Travel Markets to North America - Mexico 1988

TABLE 42 (cont'd)

BENEFIT SEGMENTS - TRAVEL CHARACTERISTICS

| | Total | BENEFIT SEGMENT | | | |
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total trips to Canada taken by respondents (100%)	68	14+	21+	20+	13+
	%	%	%	%	%
Mode of transportation used to enter Canada					
Plane	69	69	79	59	61
Bus	20	18	17	33	8
Private car	9	7	4	8	20
Camper or RV	2	5	-	-	6
Mode of transportation used within Canada					
Private car	45	35	45	43	60
Bus (between cities)	38	36	39	35	44
Rented car	19	11	15	26	20
Public transportation (within cities)	17	16	14	20	20
Plane	9	13	-	4	28
Train	7	-	16	-	8
Camper or RV	5	11	-	4	6
Boat	2	-	4	-	6

+ Note: Small base
Note: Circled numbers represent those referred to in the main text

TABLE 43

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

| | | BENEFIT SEGMENT | | | |
	Total	Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Provinces and Territories					
Newfoundland/Labrador	6	6	5	6	6
P.E.I.	1	1	1	2	1
Nova Scotia	2	1	3	3	2
New Brunswick	1	1	1	*	1
Quebec	74	75	76	72	73
Ontario	78	80	78	77	76
Manitoba	6	6	5	8	4
Saskatchewan	6	6	4	7	5
Alberta	22	20	19	26	23
British Columbia	36	30	39	35	40
Yukon	6	6	6	6	6
Northwest Territories	2	2	3	2	2
Specific Destinations					
Montreal	49	44	(54)	48	50
Quebec City	42	(52)	40	36	42
Niagara Falls	29	32	31	24	33
Toronto	23	22	23	24	21
Ottawa	21	18	24	21	(24)
Vancouver	18	15	18	17	24
Calgary	12	9	9	15	15
Vancouver Island	11	9	(15)	11	10
Regina	4	3	3	5	3
Victoria	3	3	3	3	5

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 44

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

| | | BENEFIT SEGMENT | | | |
	Total	Social Getaway	Adven-ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Top States					
California	62	63	64	61	57
New York	39	35	44	37	40
Florida	33	32	38	30	34
Texas	21	24	18	21	20
Nevada	20	20	18	21	21
Washington D.C.	17	16	19	15	19
Illinois	9	11	7	9	10
Louisiana	9	7	12	8	6
Arizona	7	7	5	7	9
Colorado	7	7	5	8	7
Pennsylvania	5	5	6	5	4
Washington	4	3	4	4	5
Massachusetts	4	4	3	5	5
8 Travel Regions					
Travel South	42	40	49	39	41
Visit U.S. West	75	74	77	76	75
New England	5	5	4	5	5
Old West Trail Foundation	4	4	3	4	6
America's Heartland	14	14	17	13	13
Foremost West	17	17	13	18	20
George Washington Country	21	20	22	20	22
Great Lakes	18	18	14	19	17

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 44 (cont'd)

BENEFIT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

		BENEFIT SEGMENT			
	Total	Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
11 Census Divisions					
West North Central	8	8	6	8	9
East South Central	2	1	2	2	2
New England	5	5	4	5	5
Middle Atlantic	43	39	47	42	43
Middle Atlantic (excluding N.Y.)	5	5	6	6	4
East North Central	15	16	12	17	16
South Atlantic	48	47	53	45	50
South Atlantic (excluding Florida)	20	19	21	19	22
West South Central	30	32	31	30	27
Mountain	35	36	31	36	38
Pacific	65	66	68	64	62
Pacific (excluding California)	6	5	7	6	7
Pacific Islands	*	–	1	*	*
Atlantic Islands	–	–	–	–	–
Specific Destinations					
New York City	33	29	(38)	31	34
Los Angeles	27	28	27	29	25
San Francisco	25	26	29	21	25
Miami	20	19	20	21	19
Las Vegas	16	18	14	17	16
Disneyland	10	12	10	10	10
Houston	9	9	7	9	10
San Diego	9	10	9	10	9
Chicago	8	9	6	8	10
New Orleans	8	6	11	7	5
Orlando	6	6	8	4	4
Dallas	5	4	4	6	3
San Antonio	5	(10)	4	5	2
Boston	4	4	3	4	5

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

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TABLE 45

BENEFIT SEGMENTS - MEDIA READERSHIP

| | Total | BENEFIT SEGMENT | | | |
		Social Getaway	Adven- ture	Sports and Adventure	Family
Total respondents (100%)	2000	477	489	693	337
	%	%	%	%	%
Top 5 daily newspapers					
Excelsior	26	21	(31)	26	24
El Universal	16	12	18	18	13
El Informador	11	(17)	4	10	(18)
Novedades	10	9	11	10	7
El Norte, Edicion el Sol	10	(14)	6	11	6
Top 5 weekly magazines					
Proceso	23	20	25	24	24
Impacto	23	20	19	24	(28)
Time	17	12	(22)	(21)	9
T.V. Novelas	15	15	13	18	14
Siempre	10	12	9	9	11
Top 5 monthly magazines					
Selecciones	63	64	61	59	(70)
Contenido	21	23	20	20	24
Vanidades	20	(30)	14	17	21
Mecanica Popular	12	8	12	15	12
Buen Hogar	12	(19)	8	9	13

Note: Circled numbers represent those referred to in the main text

7. PRODUCT SEGMENTS

7.1 Overview

This analysis was conducted based on the importance ratings given to a list of 52 activities, features and amenities that might be found at a vacation destination.

According to respondents overall, the most important product item offered by a vacation is the opportunity to increase knowledge (3.7). This interest in vacations as a learning experience appeared to be directed to getting to know more about the local inhabitants and the culture and history that shaped them. High ratings were given to interesting and friendly local people (3.5), culture different from my own (3.4), historic old cities (3.3), and museums and art galleries (3.3).

Cleanliness, safety and convenience were also important product needs as high ratings were given to hygiene and cleanliness (3.7), personal safety (3.7), environmental quality of the air, water and soil (3.5), public transportation (3.5), and manageable size to see (3.5).

An appreciation for nature and the outdoors was evident in the high ratings given to outstanding scenery (3.5), wilderness and nature (3.4), wildlife or birds (3.4), and national parks and forests (3.3).

At the same time, Mexican travelers appreciated hospitality from both the people and the weather as indicated by the ratings given to warm welcome for tourists (3.4) and reliable weather (3.4). Mexicans were also concerned with the costs of travel at their destination, evident in the ratings given to budget accommodation (3.4), and inexpensive travel in destination (3.3).

Sports and outdoor activities tended to be among the items rated as least important e.g. golf and tennis (2.0), hunting (2.1), fishing (2.2), snow skiing (2.2), campgrounds and trailer parks (2.2), water sports (2.4) and outdoor activities such as hiking, climbing (2.5). Also low on the scale of importance were casinos and gambling (2.2).

(Reference: Table 46)

7.2   <u>Segments</u>

The analysis yielded five different product segments:

<u>FIGURE 9</u>

<u>PRODUCT SEGMENTS</u>
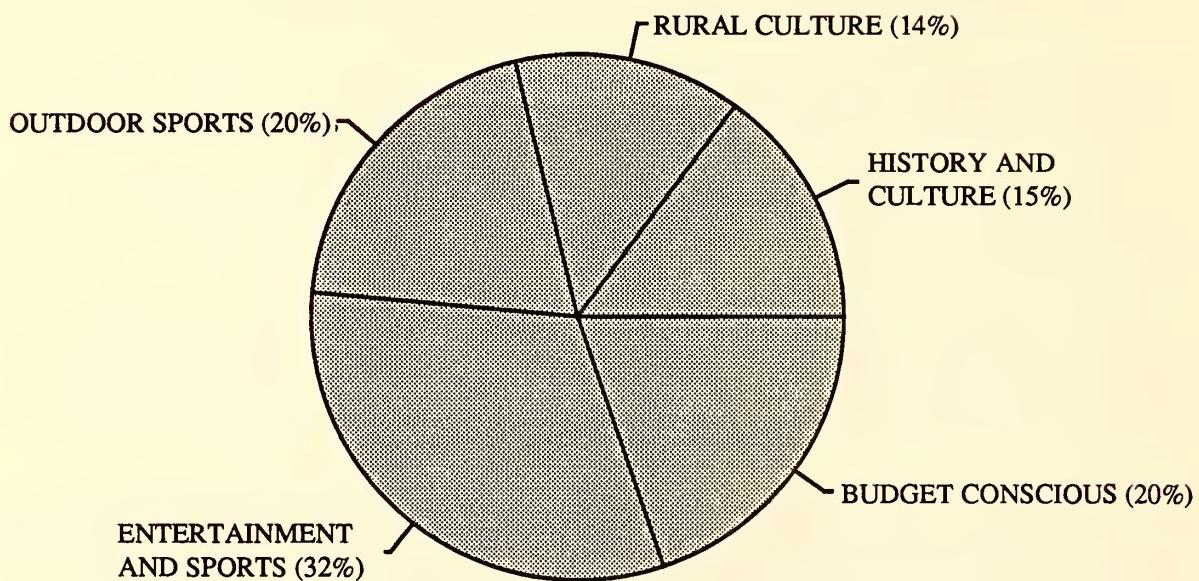
Based on total sample of 2,000 respondents

The following comparative descriptions present the distinguishing characteristics of each group:

<u>History and Culture traveler</u> (15%)

- The historical/cultural aspect of this segment comes from their above average interest in seeing historical sites, museums and art galleries, and historic old cities. They also see short guided tours as an important means of fulfilling some of these interests. Of little appeal to this group are sports or beach activities. Perhaps for this reason, a reliable sunny climate is not so important to them.

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Budget
Conscious
traveler
(20%)

- The primary concern of this group is to minimize the costs of travel. Their tendency to budget was expressed in the above average ratings they gave to inexpensive restaurants and travel at their destination, as well as to budget accommodation. At the same time, they appreciate the amenities of a first class hotel, provided they are getting value for their money. They are least interested in making use of sports, entertainment or outdoor facilities.

Entertainment
and Sports
traveler
(32%)

- This group is attracted to a fast-paced environment that includes casinos and gambling, nightlife and entertainment, and high quality restaurants. They are also interested in a number of sports related activities such as water sports, snow skiing, golf and tennis, hunting and fishing. It is therefore not surprising that they are interested in spectator sporting events as entertainment. They are also attracted to beaches and the seaside, and to cruises that perhaps offer the entertainment and sports facilities they seek.

Outdoor Sports
traveler
(20%)

- This is another sports segment, but in contrast to the Entertainment and Sports segment, this group is not drawn to nightlife, gambling and high quality restaurants. They prefer outdoor sports and physical activities that take them closer to nature. By staying in campgrounds and trailer parks they can engage in activities such as hiking and climbing, fishing, hunting and water sports and, at the same time, enjoy the physical beauty of mountains, lakes and rivers.

Rural Culture
traveler
(14%)

- Respondents in this segment are also interested in nature and the outdoors e.g. lakes and rivers and wilderness and undisturbed nature. More importantly, however, these travelers share an interest in learning more about the culture of the people at their destination. Their curiosity in the background of the local inhabitants is evident in the high ratings they gave to interesting small towns and villages, cultures different from their own, and local crafts and handiwork. They are also interested in attending local festivals, museums and art galleries and historical sites. These travelers do not look for product items associated with sports and entertainment.

(Reference: Table 47)

A visual summary of the differences among the segments was produced on a discriminant map. The two dimensions shown on the map accounted for 83% of the variance among the segment groups. Once more it should be noted that only the attributes with the longest lines (i.e. the ones with the most discriminating ability) are shown on the map.

The Sports and Entertainment group is located on the right side of the map showing an association with such attributes as casinos and gambling, nightlife and entertainment, and a variety of sports activities.

The Outdoor Sports group is also associated with a variety of sports activities, but in more of a nature context.

The Rural Culture and History and Culture groups share an association with historical sites, museums and art galleries, and other culture related product items. The Rural Culture group, however, is associated with a number of attributes relating to the outdoors, while the History and Culture group is just the opposite.

The Budget Conscious group is situated near a variety of budget related items plus first class hotels, but its position is also determined by its dissociation with outdoors, sports and entertainment related items.

(Reference: Figure 10)

FIGURE 10

DISCRIMINANT MAP FOR PRODUCT SEGMENTS
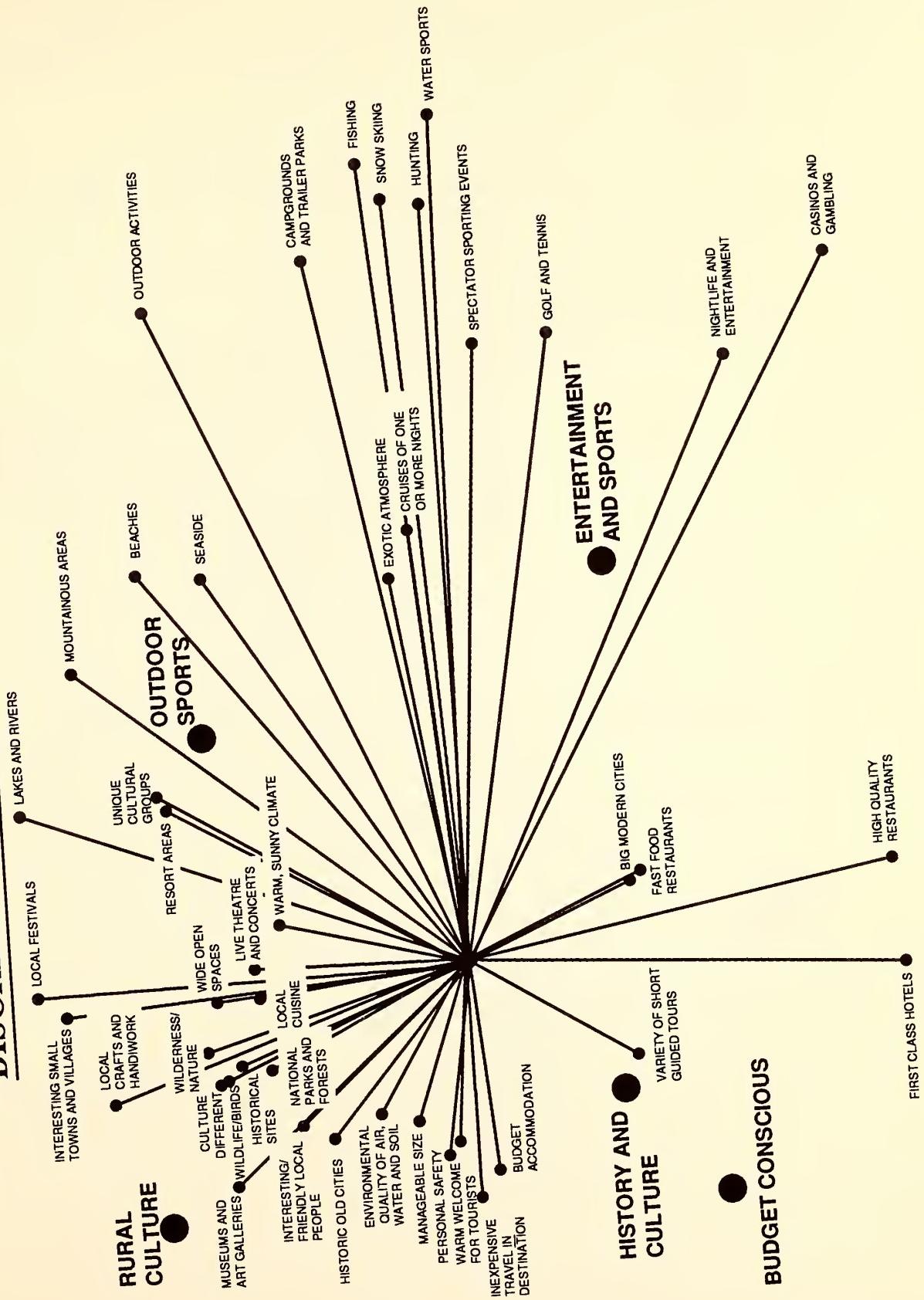
7.3 <u>Segment profiles</u>

The following characteristics disproportionately describe each product segment:

<u>History
and Culture
traveler</u>

- More likely than average to be:

    - a manager/executive or employed in a professional/technical occupation
    - university educated
    - higher income
    - living in Mexico City or Merida

- More likely than average to have:

    - taken more long haul trips
    - traveled elsewhere in the mainland U.S. or to Europe in the past 3 years
    - taken a touring type of trip
    - used a travel agent or brochures and pamphlets in planning their trip
    - taken an all-inclusive guided tour or a flight and accommodation package
    - booked with a travel agent
    - entered the U.S. by plane
    - used a rented car within the U.S.

- More likely than average to be interested in:

    - visiting Europe
    - visiting Quebec, mainly Montreal in Canada
    - visiting New York (mainly New York City) and Louisiana in the U.S.
    - visiting the Middle Atlantic census division in the U.S.

- More likely than average to read <u>Excelsior</u>, <u>Proceso</u>, and <u>Siempre</u>

<u>Budget
Conscious
traveler</u>

- More likely than average to be:

    - female
    - older (55 years of age or more)
    - married
    - a homemaker
    - junior college or trade/technical/business school educated
    - a couple with children
    - lower income
    - living in Guadalajara

- More likely than average to have:

    - taken a trip in the fall
    - traveled with a spouse/girl friend/boy friend or children
    - used friends/family in planning their trip

- More likely than average to be interested in:

    - visiting Quebec (mainly Quebec City) in Canada
    - visiting the U.S., mainly the border states
    - visiting California, mainly San Francisco in the U.S.
    - visiting the U.S. West travel region and the Pacific census division in the U.S.

- More likely than average to read El Informador, Selecciones, Vanidades, and Buen Hogar

Entertainment
and Sports
traveler

- More likely than average to be:

    - male
    - young (18-24 years of age)
    - single
    - student
    - university educated
    - single with children
    - slightly higher income

- More likely than average to have:

    - taken more pleasure trips within the past 3 years
    - traveled to the U.S., particularly the border states, in the past 3 years
    - traveled with their father and mother
    - used friends/family in planning their trip
    - decided on their destination with 1 month or less lead time

- More likely than average to be interested in:

    - visiting Alberta, mainly Calgary in Canada
    - visiting Toronto in Canada

- More likely than average to read T.V. Novelas

Outdoor Sports
traveler

- More likely than average to be:

    - young (18-24 years)
    - male
    - high school educated
    - single with children
    - living in Monterrey or Juarez

- More likely than average to have:

    - traveled alone
    - not booked accommodation in advance
    - used a private car within the U.S.

- More likely than average to be interested in:

    - visiting British Columbia in Canada
    - visiting Arizona, Foremost West travel region, and
      the East North Central census division in the U.S.

- More likely than average to read El Norte (Edicion el Sol)

Rural Culture traveler

- More likely than average to be:

    - female
    - 55 years or older
    - a homemaker
    - primary school educated
    - living in a household without children
    - living in Mexico City

- More likely than average to have:

    - visited destinations in Europe
    - taken trips of more nights duration
    - visited friends and relatives
    - stayed with friends and relatives
    - booked directly with an airline

- More likely than average to be interested in:

    - visiting the U.S. border states

- More likely than average to read Excelsior

(Reference: Tables 48 to 52)

7.4   Product segments vs. travel philosophy and benefit segments

Further insight into the product segments can be obtained by profiling them with respect to the travel philosophy and benefit segments. This reveals that the product segments are more likely than average to be represented as follows:

	Travel philosophy	Benefit
History and Culture	Budget Package	Adventure
Budget Conscious	Budget Package Reluctant	Social Getaway
Entertainment and Sports	Premium Package	Sports and Adventure
Outdoor Sports	Reluctant	Sports and Adventure
Rural Culture	Independent	Social Getaway Family

(Reference: Table 53)

7.5 Implications

The marketing implications for each of the five product segments are discussed below in turn.

History and
Culture

- Even though this segment tends to earn a higher income, it is the most likely to have a Budget Package travel philosophy. Being well-represented in the Adventure benefit segment, they are enthusiastic travelers looking for new experiences in foreign destinations. This is the segment most likely to take long haul trips to Europe. Being willing to travel long distances, they can be considered a strong potential market for travel to the U.S. and Canada. In fact, although the differences were not strong, they were the segment already the most interested in Canada. Although they were no more likely than average to have traveled in North America, they did express an above average interest in visiting large cities like New York and Montreal. Improvements in package travel and the promotion of North American cultural features appear to be necessary to attract more of this segment.

Budget
Conscious

- This is not a promising segment. They have no particular product interests other than that they be inexpensive. They are made up disproportionately of Reluctant and Social Safety travelers, neither of which have a particular interest in the travel experience. Products aimed at the Budget Package travelers would have a cross appeal to this group, but marketing efforts would be better directed at the remaining product segments.

Entertainment
and Sports

- Made up disproportionately of Sports and Adventure travelers, it is clear that this group is looking for an active, exciting vacation. It is not surprising that these travelers are relatively young and male. They are also more likely than average to be Premium Package travelers. Their wide range of interest from skiing to beaches suggests that they would do different things on different trips. Because there are more students in this segment than in others, it is possible that for many of them the costs of travel are covered by their parents. In fact, they are the group already most likely to travel with their father and mother. Regardless of who pays for the costs of a vacation, they can be considered a promising segment for the reason that they tend to take more pleasure trips than other segments.

Outdoor Sports   - There is a good fit between the outdoor sports products desired by this group and the opportunities in Canada and the U.S. to take part in them. Currently, however, this group does not show a particular interest in traveling within North America. This segment would therefore seem to provide an opportunity for significant growth in the future. Not surprisingly, this is a male group including a large number of Sports and Adventure travelers.

Rural Culture   - This is another group offering a good fit between product needs and product offerings in Canada and the U.S. At the same time, this is an older, female group predominantly from the Social Getaway and Family benefit segments. There is therefore some question as to the extent to which they would translate their product needs into actual travel. This does not mean that this group should be ignored, just that the level of marketing effort might be somewhat tempered.

TABLE 46

IMPORTANCE OF PRODUCT STATEMENTS - MEAN SCORES
(Maximum possible = 4.0, minimum possible = 1.0)

	Total
Total respondents	2000
Opportunities to increase knowledge	3.7
Hygiene and cleanliness	3.7
Personal safety	3.7
Outstanding scenery	3.5
Interesting and friendly local people	3.5
Environmental quality of air, water and soil	3.5
Public transportation	3.5
Manageable size to see	3.5
Wilderness and nature	3.4
Culture different from own	3.4
Reliable weather	3.4
Wildlife or birds	3.4
Warm welcome for tourists	3.4
Budget accommodation	3.4
National parks and forests	3.3
Inexpensive travel in destination	3.3
Historic old cities	3.3
Museums and art galleries	3.3
Warm, sunny climate	3.2
Interesting smaller towns and villages	3.2
Local cuisine	3.2
Wide open spaces	3.2
Good shopping	3.2
Historical, archeological, or military sites	3.2
Amusement or theme parks	3.2

TABLE 46 (cont'd)

IMPORTANCE OF PRODUCT STATEMENTS - MEAN SCORES
(Maximum possible = 4.0, minimum possible = 1.0)

	Total
Total respondents	1503
Good beaches for swimming and sunning	3.1
Lakes and rivers	3.1
Local crafts	3.1
Local festivals	3.1
Resort areas	3.1
Live theatre and concerts	3.1
Big modern cities	3.1
Seaside	3.0
Inexpensive restaurants	3.0
First class hotels	3.0
Variety of short guided tours	2.9
Mountainous areas	2.8
Unique cultural groups (Eskimo, Amish, etc.)	2.7
High quality restaurants	2.7
Nightlife and entertainment	2.7
Fast food restaurants	2.7
Spectator sporting events	2.7
Cruises of one or more nights	2.7
Exotic atmosphere	2.6
Outdoor activities such as hiking, climbing	2.5
Water sports	2.4
Campgrounds and trailer parks	2.2
Snow skiing	2.2
Casinos and gambling	2.2
Good fishing	2.2
Good hunting	2.1
Golf and tennis	2.0

TABLE 47

TRAVEL PRODUCT SEGMENTS

	Deviation from overall statement mean
HISTORY AND CULTURE (15%)	
Variety of short guided tours	+0.4
Historical, archeological, or military sites	+0.3
Museums and art galleries	+0.3
Historical old cities	+0.3
Outdoor activities such as hiking and climbing	-0.3
Wide open spaces to get away from crowds	-0.3
Golf and tennis	-0.3
Reliable weather	-0.4
Hunting	-0.4
Resort areas	-0.4
Spectator sporting events	-0.4
Fishing	-0.5
Water sports	-0.5
Warm sunny climate	-0.6
Seaside	-0.7
Beaches for swimming and sunning	-0.7
BUDGET CONSCIOUS (20%)	
First class hotels	+0.3
Inexpensive restaurants	+0.3
Reliable weather	+0.3
Inexpensive travel in destination	+0.2
Fast food restaurants	+0.2
Budget accommodation	+0.2
Fishing	-0.4
Interesting small towns and villages	-0.4
Casinos and gambling	-0.4
Lakes and rivers	-0.4
Water sports	-0.5
Local festivals	-0.5
Unique and different cultural groups	-0.5
Mountainous areas	-0.5
Nightlife and entertainment	-0.5
Cruises of one or more nights	-0.5
Outdoor activities such as hiking and climbing	-0.5
Campgrounds and trailer parks	-0.5
Exotic atmosphere	-0.6
Snow skiing	-0.7

TABLE 47 (cont'd)

TRAVEL PRODUCT SEGMENTS

	Deviation from overall statement mean
ENTERTAINMENT AND SPORTS (32%)	
Casinos and gambling	+0.8
Nightlife and entertainment	+0.7
Water sports	+0.6
Snow skiing	+0.6
Golf and tennis	+0.5
Seaside	+0.4
Beaches for swimming and sunning	+0.4
Spectator sporting events	+0.4
Hunting	+0.4
Fishing	+0.4
Cruises of one or more nights	+0.4
High quality restaurants	+0.3
Local crafts and handiwork	-0.2
Museums and art galleries	-0.2
National parks and forests	-0.2
Chance to see wildlife/birds	-0.2
Inexpensive travel in destination	-0.2
OUTDOOR SPORTS (20%)	
Outdoor activities such as hiking and climbing	+0.7
Campgrounds and trailer parks	+0.6
Fishing	+0.6
Hunting	+0.5
Mountainous areas	+0.4
Water sports	+0.4
Unique and different cultural groups	+0.4
Lakes and rivers	+0.3
Nightlife and entertainment	-0.3
Shopping	-0.3
Casinos and gambling	-0.3
First class hotels	-0.4
High quality restaurants	-0.4

TABLE 47 (cont'd)

TRAVEL PRODUCT SEGMENTS

	Deviation from overall statement mean
RURAL CULTURE (14%)	
Interesting small towns and villages	+0.5
Local festivals	+0.5
Museums and art galleries	+0.4
Culture different from my own	+0.4
Local crafts and handiwork	+0.4
Lakes and rivers	+0.4
Historical, archeological, or military sites	+0.3
Wilderness and undisturbed nature	+0.3
Interesting and friendly local people	+0.3
Fast food restaurants	-0.3
Outdoor activities such as hiking and climbing	-0.4
Snow skiing	-0.4
First class hotels	-0.4
High quality restaurants	-0.4
Spectator sporting events	-0.5
Golf and tennis	-0.5
Campgrounds and trailer parks	-0.5
Nightlife and entertainment	-0.5
Fishing	-0.6
Water sports	-0.6
Casinos and gambling	-0.7
Hunting	-0.7

TABLE 48

PRODUCT SEGMENTS - DEMOGRAPHICS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Sex						
Male	50	50	40	(61)	(57)	30
Female	50	50	(60)	39	43	(70)
Age						
18 - 24 years	31	23	15	(47)	36	17
25 - 34 years	24	26	25	25	24	19
35 - 44 years	20	22	24	17	19	20
45 - 54 years	12	17	15	7	11	15
55 - 64 years	8	8	(11)	3	6	(16)
65 years or over	6	4	(9)	2	4	(13)
Marital status						
Single	41	35	24	(55)	45	30
Married	55	60	(70)	43	52	59
Living together	*	*	-	-	-	*
Divorced/separated/widowed	2	2	3	1	1	4
Other	3	2	4	1	2	8
Occupation						
Owner	3	3	2	3	5	2
Manager/executive	11	(15)	11	12	11	8
Professional/technical	22	(30)	20	21	21	20
Clerical/sales	12	10	13	13	14	9
Skilled worker	4	3	4	4	7	3
Unskilled worker	1	1	1	*	*	1
Student	18	11	8	(29)	21	9
Retired	4	4	6	2	3	5
Homemaker	24	23	(34)	14	18	(42)
Other	1	-	1	1	1	1
City						
Mexico City	40	(47)	29	42	36	(49)
Guadalajara	16	9	(24)	14	17	14
Monterrey	16	10	13	18	(21)	17
Hermosillo	9	9	13	11	4	8
Merida	9	(20)	13	6	5	6
Juarez	10	6	8	10	(17)	7

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

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TABLE 48 (cont'd)

PRODUCT SEGMENTS - DEMOGRAPHICS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter- tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Education						
Elementary school	6	2	⑨	3	8	⑮
Junior high school	7	7	⑪	5	5	10
Technical/commercial	15	13	㉑	11	15	17
Senior high school	22	19	20	23	㉗	17
University	50	㉖⓪	40	㊸	45	41
Life cycle						
Living alone	2	2	2	2	1	3
Living with one adult	9	9	13	5	10	14
Single with children	23	19	16	㉜	㉘	13
Couple with children	42	45	㊾	37	40	41
Other	24	26	20	25	21	29
Living arrangement						
Live alone	2	2	2	2	1	3
Live with children	66	63	66	69	69	58
Live without children	32	35	32	29	30	㊴
Mean no. of adults 18 years or over	3.2	3.2	3.1	3.4	3.2	3.1
Whether any children under 18 years in household						
Yes	66	63	66	69	69	58
No	34	37	34	31	31	㊷
Household income (in pesos) (1987/1988 financial year)						
11,000,000 or less	26	20	㉞	21	31	28
11,000,001 - 17,000,000	21	16	21	22	21	21
17,000,001 - 25,000,000	19	21	17	21	19	18
Over 25,000,000	25	㉞	19	㉙	20	20
Refused	9	8	10	7	10	13

Note: Circled numbers represent those referred to in the main text

TABLE 49

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	PRODUCT SEGMENT				
		History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Mean no. of 4+ night pleasure trips in past 3 years	8.0	8.3	7.2	(9.1)	7.5	7.1
Destinations visited in past 3 years**						
Short haul - Mexico	88	89	83	92	89	82
- Central America	3	3	3	3	3	5
- Border states	58	51	59	63	53	62
Long haul - Elsewhere	38	(51)	35	36	30	41
Destinations visited on two most recent trips outside Mexico***						
U.S. total	84	76	88	(89)	84	78
Border states	63	51	65	68	64	64
Elsewhere in mainland U.S.	20	(25)	23	20	20	14
Hawaii/Guam/Samoa	1	1	1	1	*	*
Europe	7	(12)	5	4	8	(11)
Canada	3	5	3	2	4	2
South America	2	1	2	2	1	3
West Indies/Caribbean	2	2	2	2	1	3
Central America	1	1	*	1	2	3
Asia	*	1	-	*	-	*
Near/Middle East	*	1	1	-	*	-

*   Less than 0.5%
**   Based on 1,880 <u>respondents</u> who had actually taken at least one such trip
*** Based on 2,333 such <u>trips</u> taken by respondents

Note: Circled numbers represent those referred to in the main text

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TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter- tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
One long haul destination most like to visit						
Europe	41	(47)	35	43	41	43
U.S. total	28	19	(38)	27	28	25
Border states	13	8	(20)	9	14	(18)
Elsewhere in mainland U.S.	12	9	15	14	12	7
Hawaii/Guam/Samoa	3	2	3	4	2	1
Asia	9	10	7	9	7	11
Canada	8	10	9	8	7	5
South America	5	4	4	7	5	5
Africa	3	3	2	2	4	2
West Indies/Caribbean	3	4	3	2	4	4
Near/Middle East	2	2	2	1	4	5
Australia/New Zealand	1	1	-	1	1	*
Central America	*	-	1	-	-	1

* Less than 0.5%

Note: Circled numbers represent those referred to in the main text

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter- tainment and Sports	Outdoor Sports	Rural Culture
Total respondents took trip outside Mexico (100%)	1442	221	284	472	250	210
	%	%	%	%	%	%
Mean no. of nights away on trip	22.1	22.1	14.9	19.5	19.5	(24.8)
Season trip was taken						
Winter	15	13	14	16	16	18
Spring	16	19	13	16	16	15
Summer	44	46	44	44	46	41
Fall	25	22	(30)	24	22	26
Type of trip (Two most recent)						
Touring trip	39	(54)	38	38	33	34
Visit friends and relatives	32	18	36	31	35	(39)
Combined business and pleasure	13	10	13	15	15	10
City	8	9	6	8	6	9
Resort	4	3	3	4	4	4
Exhibition, special event or theme park	3	4	3	3	4	3
Outdoor trip	1	1	1	*	3	-
Cruise	1	1	1	1	*	1
People traveled with						
Wife/husband/girl friend/boy friend	37	42	(50)	26	34	40
Other relatives	33	31	34	36	28	32
Child(ren)	23	24	(29)	17	26	25
Traveled alone	21	16	18	22	(25)	23
Father/mother	17	17	10	(26)	12	13
Friends	12	15	10	13	14	8
Organized group/club/etc.	2	-	1	2	3	1
Business associates/ colleagues	1	1	1	1	1	2
Mean no. of people in travel party	3.4	3.4	3.6	3.4	3.5	3.2
Mean no. of children under 18 in travel party	0.9	0.8	1.0	0.8	1.2	0.8

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter- tainment and Sports	Outdoor Sports	Rural Culture
Total respondents took trip outside Mexico (100%)	1442	221	284	472	250	210
	%	%	%	%	%	%
Sources of information used in planning						
Travel agent	32	(44)	32	29	29	28
Friends/family	31	24	(36)	(34)	29	30
Brochures/pamphlets	8	(12)	8	8	8	7
Airline	6	9	3	4	7	8
Newspaper/magazine article	3	5	2	1	3	3
Embassy/consulate	2	3	2	1	1	3
Government tourism office/ board	2	1	2	1	1	3
Books/library	1	1	1	1	2	1
Tour operator/company	1	3	*	1	1	-
Advertisements	1	2	1	1	1	1
Clubs/associations	1	*	1	1	2	1
Other	1	1	1	1	1	1
None	36	31	34	36	37	40
Trip package						
Independent	84	69	83	87	89	85
All-inclusive guided tour	7	(15)	7	5	4	7
Flight and accommodation package only	7	(11)	8	6	4	7
Guided tour only	3	4	2	2	3	1
Where booked						
Stayed with friends/relatives	47	34	49	47	49	(53)
Travel agent	38	(53)	41	36	30	36
Direct with hotel etc.	19	21	19	17	16	21
Airline	17	19	11	16	18	(21)
Tour company/holiday company	1	2	1	*	*	1
Other	5	5	4	5	8	4
Did not book accommodation in advance	12	6	12	14	(18)	7

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	History and Culture	Budget Conscious	Entertainment and Sports	Outdoor Sports	Rural Culture
PRODUCT SEGMENT						
Total respondents took trip outside Mexico (100%)	1442	221	284	472	250	210
	%	%	%	%	%	%
Number of months before leaving – decided on destination						
1 month or less	64	62	64	⑥⑨	58	61
Over 1 month to 2 months	11	12	12	11	9	8
Over 2 months to 3 months	7	5	8	7	8	9
Over 3 months to 4 months	4	3	2	3	7	4
Over 4 months	15	17	14	10	19	18
Number of months before leaving – trip was booked						
½ month or less	73	64	75	76	75	68
Over ½ month to 1 month	17	23	18	15	11	25
Over 1 month to 2 months	5	5	3	5	7	4
Over 2 months	6	9	5	5	6	4
Total trips to U.S. taken by respondents (100%)	1953	271	394	700	319	266
	%	%	%	%	%	%
Mode of transportation used to enter U.S.						
Plane	47	⑥⓪	49	43	41	47
Private car	42	31	43	46	44	40
Bus	8	6	5	8	12	12
Rented car	1	1	1	1	1	1
Train	1	1	1	1	1	–
Camper or RV	1	1	*	1	1	–
Boat	*	–	–	*	–	–
Mode of transportation used within U.S.						
Private car	69	57	70	72	⑦⑥	66
Rented car	18	②⑥	18	18	11	21
Public transportation (within cities)	11	12	14	10	12	9
Bus (between cities)	4	8	4	4	3	5
Plane	3	2	3	3	4	6
Camper or RV	1	2	1	2	1	1
Train	1	1	1	1	–	*
Boat	1	*	–	1	*	1

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

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TABLE 49 (cont'd)

PRODUCT SEGMENTS - TRAVEL CHARACTERISTICS

	Total	PRODUCT SEGMENT				
		History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total trips to Canada taken by respondents (100%)	68	19+	12+	13+	17+	7+
	%	%	%	%	%	%
Mode of transportation used to enter Canada						
Plane	69	53	89	79	68	55
Bus	20	43	-	15	14	19
Private car	9	4	11	-	13	26
Camper or RV	2	-	-	5	5	-
Mode of transportation used within Canada						
Private car	45	32	49	35	48	89
Bus (between cities)	38	58	58	15	31	11
Rented car	19	11	-	33	37	-
Public transportation (within cities)	17	12	27	17	17	15
Plane	9	4	8	6	16	15
Train	7	14	-	5	-	15
Camper or RV	5	8	-	5	5	-
Boat	2	-	6	-	-	11

+ Note: Small base
Note: Circled numbers represent those referred to in the main text

TABLE 50

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - CANADA

	Total	PRODUCT SEGMENT				
		History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Provinces and Territories						
Newfoundland/Labrador	6	5	5	6	7	7
P.E.I.	1	1	1	1	3	2
Nova Scotia	2	1	2	2	4	2
New Brunswick	1	1	*	1	-	1
Quebec	74	(82)	(79)	72	68	70
Ontario	78	80	80	77	74	81
Manitoba	6	3	7	7	7	5
Saskatchewan	6	1	7	6	8	4
Alberta	22	20	19	(26)	21	21
British Columbia	36	37	31	36	(40)	32
Yukon	6	3	6	6	9	7
Northwest Territories	2	2	3	2	3	1
Specific Destinations						
Montreal	49	(56)	48	49	45	45
Quebec City	42	44	(51)	38	38	41
Niagara Falls	29	33	31	26	26	35
Toronto	23	21	21	(27)	18	24
Ottawa	21	25	20	21	21	21
Vancouver	18	21	14	20	17	16
Calgary	12	9	8	(17)	12	11
Vancouver Island	11	10	10	12	14	9
Regina	4	1	3	4	5	2
Victoria	3	4	3	2	5	4

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 51

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	Total	PRODUCT SEGMENT				
		History and Culture	Budget Conscious	Entertainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Top States						
California	62	61	(69)	57	62	63
New York	39	(47)	32	41	35	40
Florida	33	32	32	35	28	37
Texas	21	15	21	23	21	21
Nevada	20	21	23	22	17	13
Washington D.C.	17	20	16	18	15	15
Louisiana	9	(13)	10	8	5	8
Illinois	9	9	8	10	9	7
Arizona	7	5	7	6	(10)	6
Colorado	7	5	7	7	9	8
Pennsylvania	5	5	5	6	5	3
Washington	4	7	3	4	4	6
Massachusetts	4	5	3	4	5	7
8 Travel Regions						
Travel South	42	47	42	43	36	45
Visit U.S. West	75	77	(81)	73	75	74
New England	5	6	3	4	5	8
Old West Trail Foundation	4	3	4	4	7	4
America's Heartland	14	17	14	13	13	16
Foremost West	17	12	15	16	(23)	17
George Washington Country	21	24	19	22	20	18
Great Lakes	18	16	16	19	21	14

Note: Circled numbers represent those referred to in the main text

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TABLE 51 (cont'd)

PRODUCT SEGMENTS
TOP THREE VACATION DESTINATIONS
INTERESTED IN VISITING - U.S.A.

	Total	PRODUCT SEGMENT				
		History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
11 Census Divisions						
West North Central	8	8	8	6	10	10
East South Central	2	3	1	2	2	1
New England	5	⑥	3	4	5	8
Middle Atlantic	43	㊿	36	46	39	42
Middle Atlantic (excluding N.Y.)	5	6	5	6	⑥	3
East North Central	15	14	13	17	⑲	11
South Atlantic	48	49	47	50	42	50
South Atlantic (excluding Florida)	20	22	19	20	20	20
West South Central	30	28	31	32	29	30
Mountain	35	31	37	37	38	29
Pacific	65	67	㉛	60	65	66
Pacific (excluding California)	6	9	4	6	6	7
Pacific Islands	*	–	*	*	1	–
Atlantic Islands	–	–	–	–	–	–
Specific Destinations						
New York City	33	㊴	27	35	32	33
Los Angeles	27	29	30	26	26	27
San Francisco	25	28	㉛	20	22	27
Miami	20	17	20	23	18	21
Las Vegas	16	19	19	18	12	10
Disneyland	10	6	11	11	11	12
San Diego	9	9	11	9	9	9
Houston	9	7	9	9	9	9
Chicago	8	8	6	10	9	7
New Orleans	8	11	9	7	5	8
Dallas	5	3	6	6	4	3
San Antonio	5	3	6	4	6	7
Boston	4	5	3	3	4	6

* Less than 0.5%
Note: Circled numbers represent those referred to in the main text

TABLE 52

PRODUCT SEGMENTS - MEDIA READERSHIP

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter- tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	645	399	271
	%	%	%	%	%	%
Top 5 daily newspapers						
Excelsior	26	(30)	20	27	22	(30)
El Universal	16	19	13	19	13	15
El Informador	11	8	(18)	9	11	12
Novedades	10	11	8	9	10	11
El Norte, Edicion el Sol	10	5	7	10	(14)	11
Top 5 weekly magazines						
Proceso	23	(29)	22	21	25	22
Impacto	23	22	26	23	22	19
Time	17	18	13	19	19	15
T.V. Novelas	15	12	15	(19)	13	13
Siempre	10	(14)	12	7	9	11
Top 5 monthly magazines						
Selecciones	63	65	(68)	63	59	55
Contenido	21	23	24	19	22	20
Vanidades	20	22	(26)	19	16	19
Mecanica Popular	12	12	11	14	15	5
Buen Hogar	12	13	(17)	9	8	15

Note: Circled numbers represent those referred to in the main text

TABLE 53

PRODUCT SEGMENTS BY TRAVEL PHILOSOPHY
AND BENEFIT SEGMENTS

		PRODUCT SEGMENT				
	Total	History and Culture	Budget Conscious	Enter-tainment and Sports	Outdoor Sports	Rural Culture
Total respondents (100%)	2000	289	392	644	398	271
	%	%	%	%	%	%
Travel philosophy segment						
Independent	24	26	17	25	23	(34)
Premium Package	28	25	26	(37)	23	18
Budget Package	25	(37)	(29)	19	24	21
Reluctant	23	12	(28)	20	(30)	26
Benefit segment						
Social Getaway	24	30	(43)	8	17	(38)
Adventure	25	(37)	21	26	19	20
Sports and Adventure	35	20	17	(50)	(51)	16
Family	17	13	18	16	14	(26)

Note: Circled numbers represent those referred to in the main text

8. PERCEPTIONS OF CANADA/U.S. VS. IMPORTANCE RATINGS

8.1 Perception ratings

In order to obtain very specific information regarding the images of the vacation products available in Canada and the U.S., respondents were asked to compare the two countries against other overseas destinations on a series of attributes using a five point scale as follows:

	Weight
A lot better	+2
A little better	+1
The same	0
Not quite as good	-1
Not nearly as good	-2

The weights were added at the data processing stage as respondents answered based only on the verbal scale.

Canada was rated on a total of 31 attributes while the U.S. was rated on a total of 33 attributes. Although basically similar, there were several differences in the lists of attributes selected to rate each country.

Due to concerns about potential fatigue, respondents were randomly asked to rate either Canada or the U.S. but not both i.e. approximately half the sample rated each destination.

The mean ratings for Canada and the U.S. were mostly positive, indicating a better than average rating on almost every attribute. The following observations can be made:

Canada   -   Many of the highest rated attributes related to Canada's natural environment. Scenic attributes included outstanding scenery (1.13), national parks and forests (1.09), and seeing wildlife in a natural setting (0.96). Outdoors activities were also among the highest rated attributes, including snow skiing (1.09) and hiking/climbing (0.77). Other high ratings were given to hygiene and cleanliness (1.01), personal safety (0.90), and facilities such as public transportation (0.71) and first class hotels (0.70).

       On the negative side, beaches (-0.48) and water sports (-0.02) received the lowest ratings. Also rated comparatively poorly were value for vacation money (0.21) and inexpensive travel to destination country (0.23).

U.S. - For the U.S., entertainment and services received the highest rankings. Amusement or theme parks (1.34) was the highest rated item, followed by casinos and gambling (1.09), shopping (1.05), first class hotels (1.00), public transportation (0.88), nightlife and entertainment (0.84), variety of things to see and do (0.82), and fast food restaurants (0.81). As well, national parks and forests (0.85) were highly rated, although other scenic attributes and outdoors activities received middle to low ratings. Personal safety was rated at 0.47, a contrast from the typically negative perceptions of the U.S. on this item by other countries surveyed.

Attributes receiving comparatively low rankings were beaches (0.03), interesting and friendly local people (0.17), historical sites and buildings (0.20), unique cultural groups (0.20) and, as with Canada, value for vacation money (0.21).

(Reference: Tables 54 and 55)

TABLE 54

PERCEPTIONS OF CANADA ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	Total
Total respondents rating Canada	999
Outstanding scenery	+1.13
National parks and forests	+1.09
Snow skiing	+1.09
Hygiene and cleanliness	+1.01
Seeing wildlife in a natural setting	+0.96
Personal safety	+0.90
Outdoor activities such as hiking, climbing	+0.77
Public transportation	+0.71
First class hotels	+0.70
Interesting and friendly local people	+0.68
Unique cultural groups (Eskimo, Amish, etc.)	+0.66
Amusement or theme parks	+0.64
Shopping	+0.56
Variety of things to see and do	+0.54
High quality restaurants	+0.53
Kinds of things like to do on vacation	+0.46
Hunting	+0.46
Fishing	+0.42

* Mean scores based on   "a lot better" = +2
                             "a little better" = +1
                             "the same" = 0
                             "not quite as good" = -1
                             "not nearly as good" = -2

TABLE 54 (cont'd)

PERCEPTIONS OF CANADA ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	Total
Total respondents rating Canada	999
Museums and art galleries	+0.42
Local festivals	+0.39
Live theatre and concerts	+0.37
Spectator sporting events	+0.36
Budget accommodation	+0.32
Inexpensive restaurants	+0.30
Inexpensive travel in destination country	+0.29
Nightlife and entertainment	+0.26
Historical sites and buildings	+0.25
Inexpensive travel to destination country	+0.23
Value for vacation money	+0.21
Water sports	-0.02
Beaches for swimming and sunning	-0.48

* Mean scores based on "a lot better" = +2
"a little better" = +1
"the same" = 0
"not quite as good" = -1
"not nearly as good" = -2

TABLE 55

PERCEPTIONS OF THE U.S. ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	Total
Total respondents rating the U.S.	1001
Amusement or theme parks	+1.34
Casinos and gambling	+1.09
Shopping	+1.05
First class hotels	+1.00
Public transportation	+0.88
National parks and forests	+0.85
Nightlife and entertainment	+0.84
Variety of things to see and do	+0.82
Fast food restaurants	+0.81
Opportunity to escape from the ordinary	+0.75
Availability of package vacations	+0.70
High quality restaurants	+0.70
Opportunities to increase knowledge	+0.68
Live theatre and concerts	+0.61
Snow skiing	+0.59
Kinds of things like to do on vacation	+0.59
Outstanding scenery	+0.57
Resort areas	+0.54
Museums and art galleries	+0.53
Personal safety	+0.47

* Mean scores based on "a lot better" = +2
                       "a little better" = +1
                       "the same" = 0
                       "not quite as good" = -1
                       "not nearly as good" = -2

TABLE 55 (cont'd)

PERCEPTIONS OF THE U.S. ON VARIOUS
PRODUCT ATTRIBUTES AS COMPARED WITH
OTHER OVERSEAS DESTINATIONS*

	Total
Total respondents rating the U.S.	1001
Water sports	+0.46
Budget accommodation	+0.45
Mountainous areas	+0.40
Inexpensive restaurants	+0.39
Outdoor activities such as climbing, hiking	+0.39
Opportunity to be daring and adventuresome	+0.33
Hunting	+0.25
Fishing	+0.23
Value for vacation money	+0.21
Unique cultural groups (Eskimo, Amish, etc.)	+0.20
Historical sites and buildings	+0.20
Interesting and friendly local people	+0.17
Beaches for swimming and sunning	+0.03

* **Mean scores** based on "a lot better" = +2
                                     "a little better" = +1
                                     "the same" = 0
                                     "not quite as good" = -1
                                     "not nearly as good" = -2

8.2 Perception vs. importance - total sample

While perception ratings are useful in themselves, additional insight can be obtained by comparing these ratings against their importance to respondents. For example, a particularly high or low perception rating would become irrelevant if it was determined that the attribute was low in importance.

With this in mind, perception ratings were plotted against importance ratings in order to give a visual summary of their relationship. (It will be recalled that the importance ratings were used to create the product segments.) The top areas of the plots are those of most relevance as they correspond to the areas of greatest rated importance.

The area in the top right of each map represents attributes of high importance and high perception, and thus identifies major strengths. On the other hand, the area in the top left of each map represents high importance and low perception i.e. major weaknesses.

Vertical and horizontal lines have been drawn on each map to divide it into quadrants. It should be noted that the locations of these lines are basically arbitrary, but have been selected to roughly split the attributes into equal halves. For example, a roughly equal number of attributes would appear above the horizontal line as would appear below it.

It should also be noted that the maps for Canada include 27 attributes while the maps for the U.S. include 29 attributes for which both perception and importance ratings are available. Perceptions ratings were available for a further two attributes (e.g. "kinds of things I like to do on vacation" and "variety of things to see and do"), but since corresponding importance ratings were not obtained, these could not be included in the map.

The following observations can be made:

Canada - Major strengths included a number of outdoor attributes (e.g. outstanding scenery, national parks and forests, and wildlife and birds), as well as several positive social features (e.g. hygiene and cleanliness, personal safety, and interesting and friendly local people. Other strengths were public transportation, amusement or theme parks, and shopping.

Some borderline weaknesses included inexpensive travel in destination, budget accommodation, historical sites, and museums and art galleries. Although not in the upper left quadrant, beaches were arguably the greatest weakness for Canada.

(Reference: Figure 11)

U.S.   - Major strengths included amusement or theme parks and shopping. Other strengths were the many opportunities to increase knowledge and escape from the ordinary. Also considered to be strengths were public transportation, national parks and forests, live theatre and concerts, and outstanding scenery.

Some weaknesses were interesting and friendly local people, historical sites, and beaches for swimming and sunning.

(Reference: Figure 12)

FIGURE 11
ATTRIBUTE IMPORTANCE VS. PERCEPTION - CANADA

Pleasure Travel Markets to North America - Mexico 1988
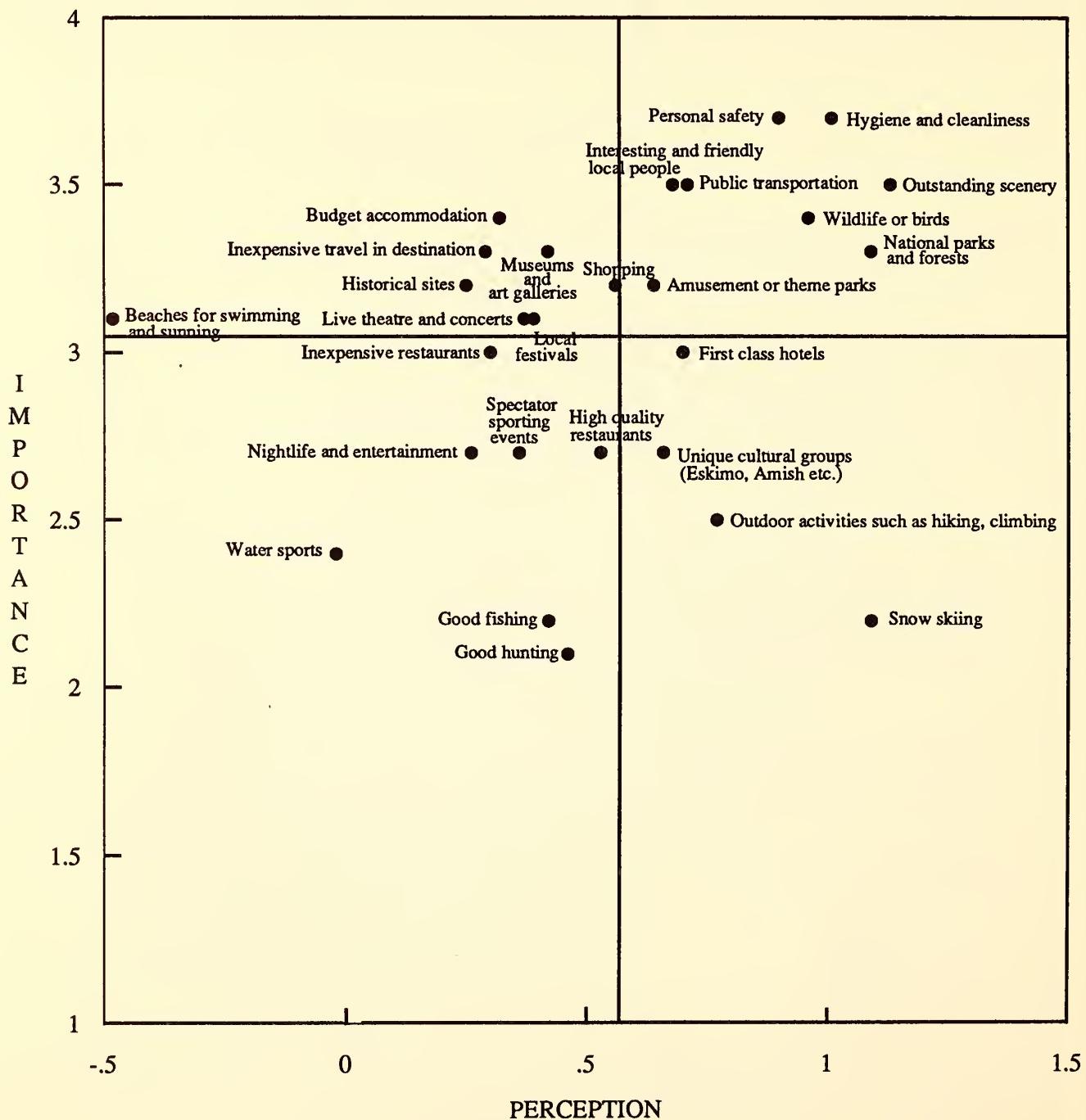
FIGURE 12
ATTRIBUTE IMPORTANCE VS. PERCEPTION - U.S.

Pleasure Travel Markets to North America - Mexico 1988
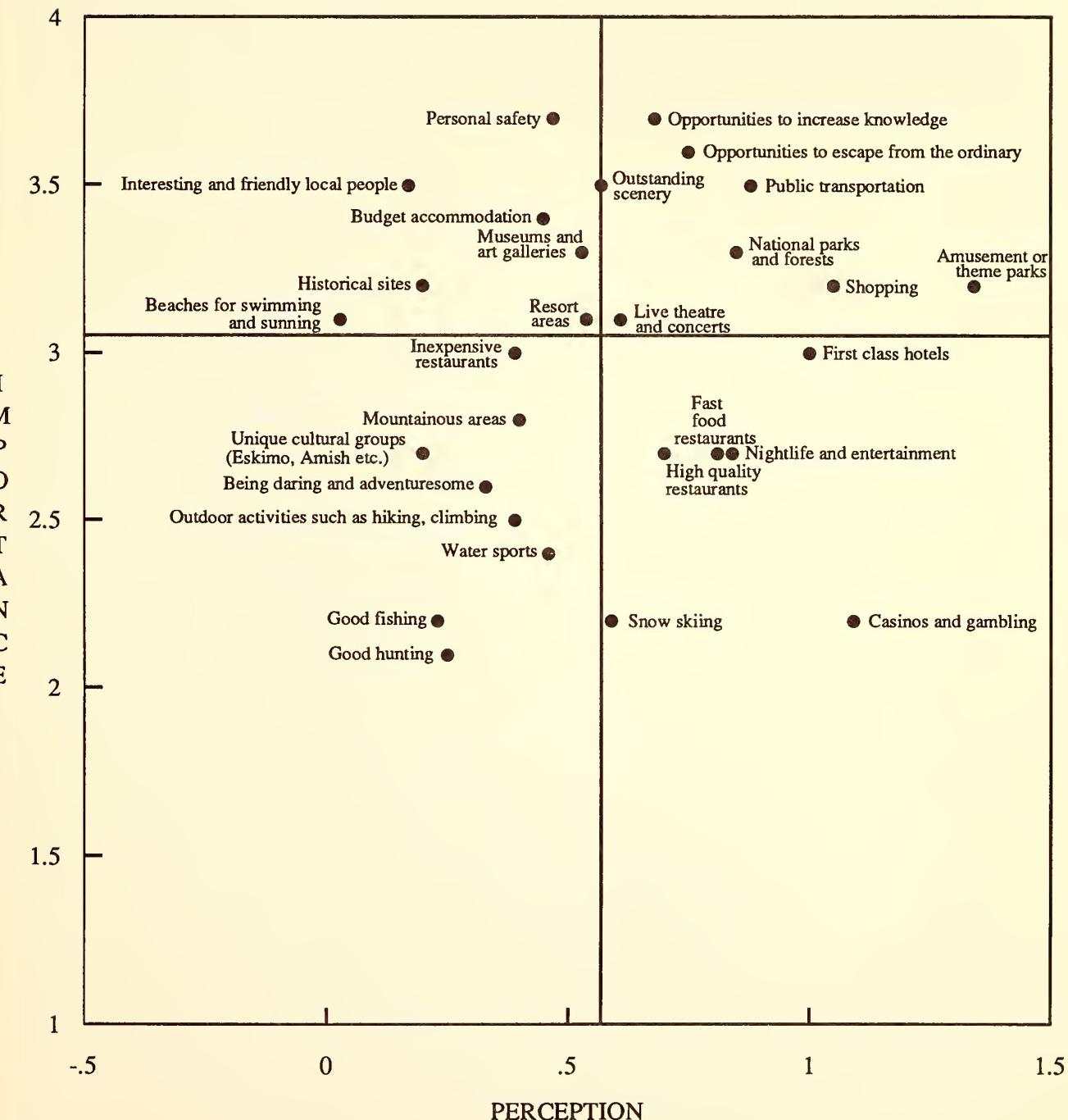
8.3   Most appealing feature of Canada as a vacation destination

Respondents who had ever traveled to Canada were asked what one thing about it would make them recommend it as a vacation destination. This was an open ended question and respondents' answers were grouped into several different categories. Although they were asked to name one feature, many respondents, in fact named more than one. This question was not asked regarding the U.S.

Almost half the respondents (48%) who had traveled to Canada mentioned the beautiful scenery as its most appealing feature. In support of the scenic beauty were responses such as national parks and forests (26%), Niagara Falls (20%), and lakes and rivers (9%). As well as being scenic, the friendly local people (44%) and cleanliness (21%) were seen as some of Canada's other outstanding qualities.

(Reference: Table 56)

TABLE 56

MOST APPEALING FEATURE OF CANADA
AS A VACATION DESTINATION

	Total
Total respondents been to Canada (100%)	350
	%
Beautiful scenery	48
Friendly local people	44
National parks/forests	26
Clean	21
Niagara Falls	20
Cities	15
Advanced/modern	12
Good food	11
Lakes and rivers	9
Variety of things to do	8
Historical sites	8
Places worth visiting	6
Leisurely/relaxing	6
Sunny/pleasant climate	4
Inexpensive	3

APPENDIX I

BASIC DATA

Newspaper and magazine readership

Demographics

DAILY NEWSPAPERS READ OR LOOKED
INTO REGULARLY
(At least 3 of every 6 issues)

	Total
Total respondents (100%)	2000
	%
Excelsior	26
El Universal	16
El Informador	11
Novedades	10
El Norte Edicione El Sol	10
Diario de Juarez	9
El Imparcial	9
Diario de Yucatan	8
El Heraldo de Mexico	6
La Jornado	6
El Occidental	6
Dvaciones	5
Uno mas Uno	5
El Financiero	4
El Norte Ed Las Cumbres	4
Other	3
Do not read newspapers	7

* Based on those with 75 or more mentions

WEEKLY PERIODICALS AND MAGAZINES
READ OR LOOKED INTO REGULARLY
(At least 2 of every 4 issues)*

	Total
Total respondents (100%)	2000
	%
Procesco	23
Impacto	23
Time	17
T.V. Novelas	15
Siempre	10
Tiempo Libre	7
Expansion	5
Others	8
Do not read weekly periodicals and magazines	37

* Based on those with 75 or more mentions

MONTHLY MAGAZINES READ OR LOOKED
INTO REGULARLY
(At least 2 of every 4 issues)*

	Total
Total respondents (100%)	2000
	%
Selecciones	63
Contenido	21
Vanidades	20
Mecanica Popular	12
Buen Hogar	12
Vogue	10
Cosmopolitan	10
Geomundo	10
Activa	8
Kena	8
Claudia	6
Tu	6
Others	10
Do not read monthly magazines	20

* Based on those with 75 or more mentions

SAMPLE DEMOGRAPHICS

	Total
Total respondents (100%)	2000
	%

Sex

Male	50
Female	50

Age

18 - 24 years	31
25 - 34 years	24
35 - 44 years	20
45 - 54 years	12
55 - 64 years	8
65 years or over	6

Marital status

Single	41
Married	55
Living together	*
Divorced/separated/widowed	2
Other	3

Working status

Full time	(53)
Owner	3
Manager/executive	11
Professional/technical	22
Clerical/sales	12
Skilled worker	4
Unskilled worker	1
Not at all	(47)
Retired	4
Student	18
Homemaker	25

Education

Elementary school	6
Junior high school	7
Technical/commercial	22
Senior high school	15
University	50

	Total
Total respondents (100%)	2000
	%
Whether chief wage earner	
Yes	28
No	72
Household income in pesos (1987 financial year)	
11,000,000 or less	26
11,000,001 - 17,000,000	21
17,000,001 - 25,000,000	19
Over 25,000,000	25
Refused	9
Life cycle	
Living alone	2
Living with one adult	9
Single with children	23
Couple with children	42
Other	24
Living arrangement	
Live alone	2
Living with children	66
Living without children	32
Number of household members 18 years or over	
1	3
2	38
3	22
4	18
5	11
6 or more	9
Mean	3.2

	Total
Total respondents (100%)	2000
	%

Number of household members under 18 years

None	34
1	23
2	23
3 or more	20
Mean	1.4

Whether members of household are related

Yes	96
No	2
Single member house	2

Whether self-employed

Yes	25
No	75

Friends or relatives presently live in ...

Canada - yes	7
- no	93
U.S. - yes	69
- no	31

Fluency in English

Read	65
Write	59
Speak	61
None	32

Fluency in French

Read	12
Write	9
Speak	11
None	86

APPENDIX II

QUESTIONNAIRE

INTERNATIONAL TRAVEL STUDY #B123

SCREENER

Good_____. I'm_____ of (COMPANY NAME) and we're doing a study about holiday travel.

S1.   Are you eighteen years of age or over?

                                        Yes ----- 1
                                        No ------ 2 ➡ ASK TO SPEAK TO HOUSE-
                                                       HOLD MEMBER 18 OR OVER

S2.   Including yourself, how many people eighteen years of age or older live in your household at the present time?
                                                        _10

           1   2   3   4   5 or more
           ▼
        SKIP TO QU.S7

S3.   As far as you can remember, in the past three years, that is, since September 1985, how many of these people 18 or over, including yourself, have taken a trip of four nights or more, entirely or in part for vacation or pleasure, to somewhere outside of Mexico?
                                                        _11

           0   1   2   3   4   5 or more
           ▼   ▼
        SKIP TO   ASK TO SPEAK TO THAT
        QU.S5   PERSON AND SKIP TO QU.S7

S4.   For this study we can choose only one person. Of the (ANSWER IN QU.S3) members of your household you just told me took a trip, whose birthday is coming up next? (THIS IS THE SELECTED RESPONDENT. SKIP TO QU.S7)

S5.   And how many people in your household eighteen years of age or over, including yourself, would you say are definitely or very likely to take such a trip in the next 2 years, that is, a vacation or pleasure trip of four nights or more outside of Mexico?
                                                        _12

           0   1   2   3   4   5 or more
           ▼   ▼
        TER-   ASK TO SPEAK TO THAT
        MINATE   PERSON AND SKIP TO QU.S7

S6.   For this study we can choose only one person. Of the (ANSWER TO QU.S5) members of your household you just told me are definitely or very likely to take a trip, whose birthday is coming up next? (THIS IS THE SELECTED RESPONDENT. SKIP TO QU.S7)

(IF TALKING WITH NEW RESPONDENT, REINTRODUCE YOURSELF AND PURPOSE OF STUDY)

S7.   (Just to be sure that I'm talking to the right person), in the past three years, since September 1985, have you, yourself, taken a trip entirely or in part for holiday or pleasure to somewhere outside of Mexico?
                                                    _13
                                        Yes ----- 1
                                        No ------ 2 ➡ SKIP TO QU.S9

ME

14- Blank

S8.   And were any of these trips for four nights or longer?

Yes ----- 1 - 15
No ------ 2

S9.   In the next two years, that is, <u>before</u> October 1990, how likely is it that you,
        yourself, will travel <u>outside</u> of Mexico entirely or in part for vacation or
        pleasure and stay away from home at least four nights? Would you say that you ...
        (READ LIST - CIRCLE ONE)

- 16

will <u>definitely</u> take such a trip ------ 1

are <u>very likely</u> to take such a trip --- 2

are <u>somewhat</u> likely to do so ---------- 3⌉
                                                              IF CODE 1 <u>NOT</u> CIRCLED
<u>might</u> or <u>might not</u> take such a trip --- 4 ⟶ IN QU.S8 TERMINATE
                                                              AND RECORD
<u>OR</u>   are <u>not</u> likely to take such a trip ---- 5⌋

79-0
80-1

#B123-ME

1a)   Now I'd like you to think about the vacation or pleasure trips of <u>four</u> nights or longer that you have taken in the past <u>three</u> years. Please include <u>all</u> the vacation or pleasure trips you have taken, <u>not</u> just those to places outside Mexico. Remember to include only those trips that were either entirely or in part for pleasure.

In the past <u>three</u> years since September 1985, about how many vacation or pleasure trips, in total, have you taken that were <u>four</u> nights or longer? (RECORD NUMBER)

□□ trips ──▶ IF |0|0| SKIP TO INSTRUCTION
10 11   AFTER QU.10b

1b)   And for how many of these trips was your furthest destination from home... (READ LIST AND RECORD NUMBER FOR EACH -NUMBERS MUST ADD TO NUMBER OF TRIPS IN QU.1a)

somewhere in Mexico   □□ trips (D)
                                                   12 13

somewhere in Central America   □□ trips (C)
                                                   14 15

somewhere in Southern California,   □□ trips (B)
Texas, Arizona, or New Mexico   16 17

somewhere other than Mexico,   □□ trips (A) ──▶ IF |0|0| SKIP TO
Central America, Southern   18 19   INSTRUCTION
California, Texas, Arizona,   AFTER QU.1c
or New Mexico

1c)   Of those (<u>NUMBER IN BOX A</u>) trips outside of Mexico, Central America, Southern California, Texas, Arizona, or New Mexico, how many were by plane? (WRITE IN NUMBER)

□□ trips
20 21

┌───┐
│ IF BOX A + B + C = |0|0| SKIP TO INSTRUCTION AFTER QU.10b.   │
│   │
│ IF BOX A + B + C = |0|1| ASK QU.2a to 2f ABOUT THIS TRIP OUTSIDE MEXICO. │
│   │
│ IF BOX A + B + C = |0|2| OR MORE, ASK QU.2a to 2f ABOUT MOST RECENT <u>AND</u> SECOND │
│ MOST RECENT TRIP OUTSIDE MEXICO.   │
└───┘

2a) Thinking about your (most recent/second most recent) trip of four nights or longer to somewhere outside of Mexico, which of these places did you visit on that trip? (HAND CARD "A" - CIRCLE AS MANY AS APPLY)

	Most recent	Second most recent
Southern California, Texas, Arizona, or New Mexico ----------	1 *-22*	1 *-26*
Elsewhere in Mainland U.S.A. -----	2	2
Canada -------------------------	3	3
Europe -------------------------	4	4
Central America ------------------	5	5
South America -------------------	6	6
The West Indies/Caribbean --------	7	7
Africa --------------------------	8	8
Near/Middle East -----------------	9	9
Asia ---------------------------	0	0
Hawaii/Guam/Samoa ---------------	X	X
Other South Pacific -------------	V	V
Australia/New Zealand ------------	1 *-23*	1 *-27*
Other (SPECIFY) --------------	_____	_____

2b) Which one of the trip descriptions on this card best describes what type of trip this was? (HAND CARD "B" - CIRCLE ONE ONLY)

	-24	*-28*
A visit to friends and relatives ------	1	1
A touring trip -----------------------	2	2
A city trip -------------------------	3	3
An outdoors trip --------------------	4	4
A resort trip -----------------------	5	5
A trip to an exhibition, special event, amusement or theme park -------------	6	6
A cruise ---------------------------	7	7
A trip that combined business and pleasure ---------------------------	8	8

(IF U.S.A. (CODES 1 OR 2) CIRCLED IN QU.2a ASK QU.2c,2d.
IF CANADA CIRCLED IN QU.2a ASK QU.2e,2f.
ALL OTHERS SKIP TO INSTRUCTION AFTER QU.2f)

2c) Did you enter the United States by ... (READ LIST - CIRCLE ONE)

	-25	*-29*
plane ---------------------------	1	1
train ---------------------------	2	2
bus -----------------------------	3	3
boat ----------------------------	4	4
rented car -----------------------	5	5
private car ---------------------	6	6
camper or recreational vehicle ---	7	7
OR just how? (SPECIFY) ---------	_____	_____

2d) And while you were in the United States, by which of the following did you
travel? (HAND CARD 'C' - CIRCLE AS MANY AS APPLY)

	Most recent	Second most recent
Plane --------------------------	1 -30	1 -33
Train --------------------------	2	2
Bus between cities --------------	3	3
Public transportation within cities (e.g. bus, subway, street-car, etc. but excluding taxis) -	4	4
Boat ---------------------------	5	5
Rented car ---------------------	6	6
Private car ---------------------	7	7
Camper or recreational vehicle ---	8	8

2e) Did you enter Canada by ... (READ LIST - CIRCLE ONE)

plane --------------------------	1 -31	1 -34
train --------------------------	2	2
bus ----------------------------	3	3
boat ---------------------------	4	4
rented car ---------------------	5	5
private car ---------------------	6	6
camper or recreational vehicle ---	7	7

OR just how? (SPECIFY) --------- _____ _____

2f) And while you were in Canada, by which of the
following did you travel? (HAND CARD 'C' -
CIRCLE AS MANY AS APPLY)

Plane --------------------------	1 -32	1 -35
Train --------------------------	2	2
Bus between cities --------------	3	3
Public transportation within cities (e.g. bus, subway, street-car, etc. but excluding taxis) -	4	4
Boat ---------------------------	5	5
Rented car ---------------------	6	6
Private car ---------------------	7	7
Camper or recreational vehicle ---	8	8

IF BOX A+B+C IN QU.1b = | 0 | 1 |, CONTINUE.

IF BOX A+B+C IN QU.1b = | 0 | 2 | OR MORE, ASK QU.3a TO QU.10 ABOUT MOST RECENT TRIP. SAY:
Now just thinking about your most recent trip ...)

3a) On that trip to (DESTINATION IN QU.2a), how
many nights, in total, were you away from
home? (RECORD NUMBER)

[ ][ ][ ]
36 37 38

3b) And when did you take that trip? Please
tell me the month and the year you started
that trip.   _____ | 1 | 9 | 8 | |
                     (month)   (year)
                                              41

#B123-ME1   39-
                                 40-

                                                    42-1

2d) And while you were in the United States, by which of the following did you travel? (HAND CARD 'C' - CIRCLE AS MANY AS APPLY)

	Most recent	Second most recent
Plane -----------------------------	1 ⁻³⁰	1 ⁻³³
Train -----------------------------	2	2
Bus between cities ---------------	3	3
Public transportation within cities (e.g. bus, subway, street-car, etc. but excluding taxis) -	4	4
Boat ------------------------------	5	5
Rented car -----------------------	6	6
Private car ----------------------	7	7
Camper or recreational vehicle ---	8	8

2e) Did you enter Canada by ... (READ LIST - CIRCLE ONE)

	-³¹	-³⁴
plane -----------------------------	1	1
train -----------------------------	2	2
bus -------------------------------	3	3
boat ------------------------------	4	4
rented car ------------------------	5	5
private car -----------------------	6	6
camper or recreational vehicle ---	7	7
OR just how? (SPECIFY) ---------	_____	_____

2f) And while you were in Canada, by which of the following did you travel? (HAND CARD 'C' - CIRCLE AS MANY AS APPLY)

	-³²	-³⁵
Plane -----------------------------	1	1
Train -----------------------------	2	2
Bus between cities ---------------	3	3
Public transportation within cities (e.g. bus, subway, street-car, etc. but excluding taxis) -	4	4
Boat ------------------------------	5	5
Rented car -----------------------	6	6
Private car ----------------------	7	7
Camper or recreational vehicle ---	8	8

IF BOX A+B+C IN QU.1b = | 0 | 1 |, CONTINUE.

IF BOX A+B+C IN QU.1b = | 0 | 2 | OR MORE, ASK QU.3a TO QU.10 ABOUT SECOND MOST RECENT TRIP. SAY: Now just thinking about your second most recent trip ...)

3a) On that trip to (DESTINATION IN QU.2a), how many nights, in total, were you away from home? (RECORD NUMBER)

| | | |
36 37 38

3b) And when did you take that trip? Please tell me the month and the year you started that trip.

_____ (month) | 1 | 9 | 8 | | (year)

39 -
40 -

41

42-2

4a) Whom did you travel with on this trip? (CIRCLE AS MANY AS APPLY)

-43

Travelled alone ------------------ 1 ➡ SKIP TO QU.5a

Wife/husband/girlfriend/boyfriend- 2

Child(ren) ---------------------- 3

Father/mother ------------------- 4

Other relatives ----------------- 5

Friends ------------------------- 6

Organized group/club/etc. -------- 7

Business associates/colleagues --- 8

Other (Specify) _____

4b) Including yourself, how many people were there in your __immediate__ travel party?
(CIRCLE ONE ONLY)

-44

1   2   3   4   5   6   7   8   9 or more

4c) And how many of these were under 18 years of age? (CIRCLE ONE ONLY)

-45

0   1   2   3   4   5   6   7   8   9 or more

5a) How long before your trip did you definitely decide to go to __(DESTINATION)__?
(RECORD NUMBER IN APPROPRIATE BOX)

[ ] weeks   OR   [ ] months   OR   [ ] years

46 47   48 49   50 51

5b) And how long before your trip did you actually start booking it?

[ ] weeks   OR   [ ] months   OR   [ ] years

52 53   54 55   56 57

6a) What different sources of information, if any, did you use when you were planning
the trip? (CIRCLE AS MANY AS APPLY)

	Qu.6a	Qu.6b
	-58	-60
Talked to travel agent ----------------	1	1
Picked up brochures/pamphlets ---------	2	2
Talked to friends/family members ------	3	3
Airline -------------------------------	4	4
Tour operator/company -----------------	5	5
Read articles/features in newspapers/ magazines ---------------------------	6	6
Books/went to library -----------------	7	7
Automobile association ----------------	8	8
Government tourism office/board -------	9	9
Embassy/consulate ---------------------	0	0
Clubs/associations --------------------	X	X
Advertisements ------------------------	V	V
Other (SPECIFY)_____	59	61
None ----------------------------------	X	X

6b) And which __one__ of these sources would you say was the
most important? (CIRCLE ONE) ───────────────

#B123

7a)   Was your plane ticket part of a package that included accommodation?

                                    Yes ----- 1 -62
                                    No ------ 2 → SKIP TO QU.7c

7b)   Where did you book your flight and accommodation? (CIRCLE ONE ONLY)

         Travel agent -------------------- 1 ⌐ -63
         Directly with airline ------------ 2 → SKIP TO QU.8a
         Other (SPECIFY)_____ ⌐

7c)   Where did you book your flight to and from your destination for this holiday?
      (CIRCLE ONE ONLY)
                                                    -64
         Travel agent -------------------- 1
         Directly with airline ------------ 2

         Other (SPECIFY)_____

7d)   And where did you book your accommodation for this holiday? (CIRCLE AS MANY AS
      APPLY)
                                                 -65
         Travel agent -------------------- 1
         Directly with hotel, etc. -------- 2
         Stayed with friends/relatives ---- 3
         Did not book in advance ---------- 4

         Other (SPECIFY)_____

8a)   And was your trip a guided tour, that is, did you travel with a group on a planned
      itinerary?
                                    Yes ----- 1 -66
                                    No ------ 2 → SKIP TO QU.9

8b)   And where did you book your guided tour?
                                                 -67
         Travel agent -------------------- 1
         Tour company/holiday company ----- 2
         Through an airline --------------- 3

         Other (SPECIFY)_____

#B123

9. Which of the following activities did you actually take part in during your holiday? (READ LIST STARTING AT X-ED ITEM - CIRCLE AS MANY AS APPLY)

Start
here
                                                    -68
( ) Attending concerts/live theatre ------- 1
     Attending local festivals/fairs/other
       special events ----------------------- 2
     Attending sporting events ------------- 3
     Climbing, hiking, etc. ---------------- 4
     Getting to know the local inhabitants - 5
     Dining out in restaurants ------------- 6

     Fishing ------------------------------- 7
     Going on short guided excursions/tours- 8
     Golfing or playing tennis ------------- 9
     Horse-riding -------------------------- 0
     Hunting ------------------------------- X
     Observing wildlife/bird watching ------ V
                                                    -69
     Sampling local foods ------------------ 1
     Shopping ------------------------------ 2
     Sightseeing in cities ----------------- 3
     Snow skiing (downhill or cross country) 4
     Sunbathing or other beach activities -- 5
     Swimming ------------------------------ 6

     Taking pictures or filming ------------ 7
     Sightseeing in the countryside -------- 8
     Visiting wilderness areas ------------- 9
     Visiting amusement or theme parks ----- 0
     Visiting casinos/gambling ------------- X
     Visiting friends or relatives --------- V
                                                    -70
( ) Visiting galleries/museums ------------ 1
     Visiting mountainous areas ------------ 2
     Visiting national parks or forests ---- 3
     Visiting night clubs or other places of
       entertainment (discos, dancing, etc.)- 4
     Visiting the seaside ------------------ 5
     Visiting places of historical interest- 6

     Visiting sites commemorating
       important people --------------------- 7
     Visiting places of archeological
       interest ----------------------------- 8
     Visiting places of importance in
       military history --------------------- 9
     Visiting scenic landmarks ------------- 0
     Water sports (e.g. surfing, water
       skiing, sailing, canoeing, scuba
       diving) ------------------------------ X
     Visiting health spas ------------------ V -71
     Taking a day cruise ------------------- 1
     Taking a cruise of one or more nights - 2

10a) Overall, how satisfied were you with your holiday in (DESTINATION)? Would you say you were ... (READ LIST - CIRCLE ONE)
                                                    -72
                   very satisfied -------------- 1
                   somewhat satisfied ---------- 2
                   not very satisfied ---------- 3
               Or not at all satisfied -------- 4

10b) And in the next 5 years, how likely is it that you will take another holiday to (DESTINATION)? Is it ... (READ LIST - CIRCLE ONE)
                                                    -73
                   very likely ----------------- 1
                   somewhat likely ------------- 2
                   not very likely ------------- 3
               Or not at all likely ----------- 4

(TURN PAGE AND READ QU.11 AND THEN HAND QUESTIONNAIRE AND PENCIL TO RESPONDENT)   79-0
                                                                                   80-2
#B123

11. Here are some statements describing how people might feel about vacation pleasure travel. For <u>each</u> statement listed, please put an "X" in one box to show how much you agree or disagree that the statement describes how you feel about international vacation travel. Please start at the item indicated.

Start here		Strongly agree	Agree somewhat	Disagree somewhat	Strongly disagree
( )	I like to have all my travel arrangements made before I start out on vacation --------------------------	( )1	( )2	( )3	( )4 - 6
	I take short pleasure trips whenever I have the opportunity ----	( )1	( )2	( )3	( )4
	Making arrangements for major trips can be such a bother that I end up not travelling ---------------------	( )1	( )2	( )3	( )4
	I usually choose vacation places where I have been before -----------	( )1	( )2	( )3	( )4
	For me, money spent on travel is well spent ----------------------	( )1	( )2	( )3	( )4 - 10
	In any one year I would rather take a number of short vacation trips instead of one long vacation trip --	( )1	( )2	( )3	( )4
	I would just as soon spend my money on things other than vacation travel	( )1	( )2	( )3	( )4
	I enjoy making my own arrangements for vacation trips -----------------	( )1	( )2	( )3	( )4
	Once I get to my destination, I like to stay put -----------------------	( )1	( )2	( )3	( )4 - 14
( )	I think it's worth paying more to get luxuries and extras on a vacation trip ---------------------	( )1	( )2	( )3	( )4
	I prefer to go on guided tours when vacationing overseas ----------	( )1	( )2	( )3	( )4
	I don't have to travel to enjoy a vacation --------------------------	( )1	( )2	( )3	( )4
	I don't have to spend a lot of money to enjoy a vacation ----------	( )1	( )2	( )3	( )4 - 18
	I like to go to a different place on each new vacation trip ----------	( )1	( )2	( )3	( )4
	I often choose vacation places that I have heard about from friends who have been there --------------------	( )1	( )2	( )3	( )4
	It is important that the people I encounter on a vacation trip speak my language ----------------------	( )1	( )2	( )3	( )4
	I usually travel on reduced air fares	( )1	( )2	( )3	( )4 - 22
	I like to make my arrangements as I go along on a vacation --------	( )1	( )2	( )3	( )4
	I usually use a travel agent to help me decide where to go on vacation --	( )1	( )2	( )3	( )4
	I prefer to leave the organizing to the people I'm travelling with --	( )1	( )2	( )3	( )4
	I usually buy vacation packages which include both accommodation and transportation ------------------	( )1	( )2	( )3	( )4 - 26
	When visiting another country, I like to travel from place to place rather than spending my whole vacation in one area ---------------	( )1	( )2	( )3	( )4
	Inexpensive travel <u>to</u> the destination country is important to me ---------	( )1	( )2	( )3	( )4
	I usually travel on all-inclusive package vacations ------------------	( )1	( )2	( )3	( )4
	Getting value for my vacation money is very important to me ------------	( )1	( )2	( )3	( )4 - 30

#B123-ME   PLEASE HAND BACK TO INTERVIEWER

31-1

12a) Now I'd like you to think about places <u>outside</u> Mexico that you would like to travel to for a vacation.

What are the names of <u>five</u> places that you would like to visit on an <u>international</u> vacation trip? (RECORD BELOW IN ORDER MENTIONED - PROBE UNTIL 5 PLACES GIVEN)

<u>Qu.12b</u>
<u>Most like</u>
<u>to visit</u>

1. _____   1 ⌐ 47

2. _____   2

3. _____   3

4. _____   4

5. _____   5

32 33 34
35 36 37
38 39 40
41 42 43
44 45 46

12b) Which <u>one</u> of these places would you most like to visit in the next two years? (CIRCLE ONE ONLY) ──────────────

12c) And how likely is it that you will visit (<u>PLACE FROM QU.12b</u>) in the next two years? Would you say that you ... (READ LIST - CIRCLE ONE)

will <u>definitely</u> visit ------------ 1 ⌐ 48

are <u>very</u> likely to visit --------- 2

are somewhat likely to visit ----- 3

might or might not visit --------- 4

<u>Or</u> are not likely to visit ---------- 5

13. I would like to know how important different things are to you when deciding to take an overseas vacation trip.

(TURN PAGE AND READ QU.13 AND HAND QUESTIONNAIRE AND PENCIL TO RESPONDENT)

(WHEN RESPONDENT HAS COMPLETED QU.13, TURN PAGE AND READ QU.14. HAND QUESTIONNAIRE BACK TO RESPONDENT)

#B123-ME

13. Please imagine that you are thinking of taking an <u>international</u> vacation trip. For each statement on this page, "X" one box to show how important that reason is to you when considering such a trip. Please start at the item indicated.

Start here		Very important	Somewhat important	Not very important	Not at all important
( )	Getting away from the demands of home ---------------------------	( )1	( )2	( )3	( )4 — 49
	Reliving past good times -----------	( )1	( )2	( )3	( )4
	Experiencing new and different lifestyles ------------------------	( )1	( )2	( )3	( )4
	Trying new foods -------------------	( )1	( )2	( )3	( )4
	Travelling through places that are important in history --------------	( )1	( )2	( )3	( )4 — 53
	Being free to act the way I feel ---	( )1	( )2	( )3	( )4
	Finding thrills and excitement -----	( )1	( )2	( )3	( )4
	Experiencing a simpler lifestyle ---	( )1	( )2	( )3	( )4
	Being together as a family ---------	( )1	( )2	( )3	( )4 — 57
	Meeting people with similar interests ------------------------	( )1	( )2	( )3	( )4
	Seeing and experiencing a foreign destination -----------------------	( )1	( )2	( )3	( )4
	Going places my friends haven't been	( )1	( )2	( )3	( )4
	Talking about the trip after I return home -----------------------	( )1	( )2	( )3	( )4 — 61
	Participating in sports ------------	( )1	( )2	( )3	( )4
	Watching sports events -------------	( )1	( )2	( )3	( )4
( )	Travelling to places where I feel safe and secure -------------------	( )1	( )2	( )3	( )4
	Having fun, being entertained ------	( )1	( )2	( )3	( )4 — 65
	Seeing as much as possible in the time available --------------------	( )1	( )2	( )3	( )4
	Rediscovering myself ---------------	( )1	( )2	( )3	( )4
	Visiting friends and relatives -----	( )1	( )2	( )3	( )4
	Visiting places my family came from-	( )1	( )2	( )3	( )4 — 69
	Being physically active ------------	( )1	( )2	( )3 '	( )4
	Getting a change from a busy job ---	( )1	( )2	( )3	( )4
	Being daring and adventuresome -----	( )1	( )2	( )3	( )4
	Doing nothing at all ---------------	( )1	( )2	( )3	( )4 — 73
	Learning new things, increasing my knowledge ------------------------	( )1	( )2	( )3	( )4
	Indulging in luxury ----------------	( )1	( )2	( )3	( )4
	Roughing it ------------------------	( )1	( )2	( )3	( )4
	Escaping from the ordinary ---------	( )1	( )2	( )3	( )4
	Feeling at home away from home -----	( )1	( )2	( )3	( )4 — 78

PLEASE HAND BACK TO INTERVIEWER

#B123-ME

79 - 0
80 - 8

14. When choosing a destination for an <u>international</u> vacation trip, different things are important to different people. Listed below are a number of items. For each item, please "X" one box to show how important that item is to <u>you</u> in an <u>International</u> vacation destination. Please start at the item indicated.

Start here		Very important	Somewhat important	Not very important	Not at all important
( )	High quality restaurants -----------------	( )1	( )2	( )3	( )4 - 10
	Budget accommodation ---------------------	( )1	( )2	( )3	( )4
	Seaside ----------------------------------	( )1	( )2	( )3	( )4
	Golf and tennis --------------------------	( )1	( )2	( )3	( )4
	Big modern cities ------------------------	( )1	( )2	( )3	( )4
	Historic old cities ----------------------	( )1	( )2	( )3	( )4 - 15
	Nightlife and entertainment (bars, clubs, dancing) -------------------------------	( )1	( )2	( )3	( )4
	Outstanding scenery ----------------------	( )1	( )2	( )3	( )4
	Shopping ---------------------------------	( )1	( )2	( )3	( )4
	Reliable weather -------------------------	( )1	( )2	( )3	( )4
	Standards of hygiene and cleanliness ----	( )1	( )2	( )3	( )4 - 20
	Mountainous areas ------------------------	( )1	( )2	( )3	( )4
	Local cuisine ----------------------------	( )1	( )2	( )3	( )4
	Personal safety, even when travelling alone -----------------------------------	( )1	( )2	( )3	( )4
	Snow skiing (down hill/cross-country) ---	( )1	( )2	( )3	( )4
	Interesting small towns and villages ----	( )1	( )2	( )3	( )4 - 25
	Beaches for swimming and sunning --------	( )1	( )2	( )3	( )4
	Casinos and gambling ---------------------	( )1	( )2	( )3	( )4
	Campgrounds and trailer parks -----------	( )1	( )2	( )3	( )4
	Local festivals, such as folklore and country fairs ----------------------------	( )1	( )2	( )3	( )4
	Amusement or theme parks -----------------	( )1	( )2	( )3	( )4 - 30
	Museums and art galleries ---------------	( )1	( )2	( )3	( )4
	Warm, sunny climate ----------------------	( )1	( )2	( )3	( )4
	Wilderness and undisturbed nature -------	( )1	( )2	( )3	( )4
( )	Interesting and friendly local people ---	( )1	( )2	( )3	( )4
	Wide open spaces to get away from crowds-	( )1	( )2	( )3	( )4 - 35
	Local crafts and handiwork --------------	( )1	( )2	( )3	( )4
	Outdoor activities such as hiking, climbing -------------------------------	( )1	( )2	( )3	( )4
	Inexpensive restaurants -----------------	( )1	( )2	( )3	( )4
	Public transportation such as airlines, railways, local transit systems --------	( )1	( )2	( )3	( )4 - 40
	Live theatre and concerts ---------------	( )1	( )2	( )3	( )4
	Resort areas -----------------------------	( )1	( )2	( )3	( )4
	Unique or different cultural groups such as Eskimo and Indian --------------	( )1	( )2	( )3	( )4
	National parks and forests --------------	( )1	( )2	( )3	( )4
	Inexpensive travel <u>in</u> the destination country ----------------------------------	( )1	( )2	( )3	( )4 - 45
	Variety of short guided excursions/tours-	( )1	( )2	( )3	( )4
	Exotic atmosphere ------------------------	( )1	( )2	( )3	( )4
	Warm welcome for tourists ---------------	( )1	( )2	( )3	( )4
	Lakes and rivers -------------------------	( )1	( )2	( )3	( )4
	Culture different from my own -----------	( )1	( )2	( )3	( )4 - 50
	Fishing ----------------------------------	( )1	( )2	( )3	( )4
	Hunting ----------------------------------	( )1	( )2	( )3	( )4
	First class hotels ----------------------	( )1	( )2	( )3	( )4
	Spectator sporting events ---------------	( )1	( )2	( )3	( )4
	Historical, archeological or military sites and buildings --------------------	( )1	( )2	( )3	( )4
	Chance to see wildlife and birds I don't usually see ---------------------------	( )1	( )2	( )3	( )4 - 55
	Opportunities to increase one's knowledge	( )1	( )2	( )3	( )4
	Manageable size so I can see everything I want to see --------------------------	( )1	( )2	( )3	( )4
	Water sports such as surfing, water skiing, sailing, scuba diving ----------	( )1	( )2	( )3	( )4
	Fast food restaurants -------------------	( )1	( )2	( )3	( )4
	Environmental quality of air, water and soil -----------------------------------	( )1	( )2	( )3	( )4 - 61
	Cruises of one or more nights -----------	( )1	( )2	( )3	( )4

15a) Now I'd like you to think about places in <u>Canada</u> that people might go to on a vacation. What are the names of five places <u>in Canada</u> where people might go on a vacation? (RECORD BELOW UNDER QU.15a IN ORDER MENTIONED) (PROBE:) What other places in Canada?

15b) Looking at this map of Canada, please tell me the names of three <u>other</u> places in Canada that people might go on a vacation? (HAND MAP - RECORD <u>BELOW UNDER</u> QU.15b IN ORDER MENTIONED) (PROBE:) What other places?

15c) Which places in Canada, if any, have you ever been to? (PROBE:) Any other places? (RECORD UNDER QU.15c - CIRCLE AS MANY AS APPLY. IF RESPONDENT MENTIONS PLACES NOT LISTED UNDER QU.15a OR QU.15b, RECORD BELOW UNDER "OTHER". IF NOT BEEN TO CANADA, CIRCLE "X" AND SKIP TO QU.15f)

15d) Which places, if any, have you been to in the past three years, since September, 1985? (RECORD UNDER QU.15d - CIRCLE ALL RESPONSES)

15e) Which <u>one</u> thing about Canada would make you recommend it to someone else as a vacation destination? (OPEN ENDED)

6-9

15f) You have named a number of different places in Canada. (READ ALL PLACES MENTIONED - QU.15a, QU.15b AND OTHER) Which <u>one</u> of these places would you be <u>most</u> interested in visiting or re-visiting? (RECORD UNDER QU.15f - MOST)

And which <u>one</u> would be your <u>second</u> choice? (RECORD UNDER QU.15f - 2nd)

And which <u>one</u> would be your <u>third</u> choice? (RECORD UNDER QU.15f - 3rd - TAKE BACK MAP)

	Qu.15a	Qu.15c	Qu.15d	Qu.15f		
		Ever been to	Been in past 3 yrs.	Most	2nd	3rd
10-12	1. _____	1 ⁻⁴⁹	1 ⁻⁵⁰	1 ⁻⁵²	1 ⁻⁵⁴	1 ⁻⁵⁶
13-15	2. _____	2	2	2	2	2
16-18	3. _____	3	3	3	3	3
19-21	4. _____	4	4	4	4	4
22-24	5. _____	5	5	5	5	5

	Qu.15b					
25-27	1. _____	6	6	6	6	6
28-30	2. _____	7	7	7	7	7
31-33	3. _____	8	8	8	8	8

Never been to Canada ------------- X → SKIP TO QU.15f

	Other					
34-36	1. _____	1 ⁻⁵¹	1 ⁻⁵³	1 ⁻⁵⁵	1 ⁻⁵⁷	
37-39	2. _____	2	2	2		
40-42	3. _____	3	. 3	3	3	
43-45	4. _____	4	4	4	4	
46-48	5. _____	5	5	5	5	

16a) Overall, how interested are you in visiting or re-visiting Canada in the next <u>five</u> years? Would you say you are ... (READ LIST - CIRCLE ONE)

<u>very</u> interested ------------- 1 ⁻⁵⁸

<u>somewhat</u> interested --------- 2

<u>Or</u> <u>not</u> interested ------------- 3

16b) I would like you to compare Canada with <u>other</u> overseas places that you <u>have</u> visited on a <u>vacation</u> trip and those you <u>might</u> visit in the future. Even though some people <u>know less</u> about Canada than others do, everyone has impressions of what it would be like to vacation there.

(READ QU.16b AND HAND QUESTIONNAIRE AND PENCIL TO RESPONDENT)

#B123-1

59-1
79-0
80-5

15a) Now I'd like you to think about places in the United States that people might go to on a vacation. What are the names of five places in the United States where people might go on a vacation? (RECORD BELOW UNDER QU.15a IN ORDER MENTIONED) (PROBE:) What other places in the United States?

15b) Looking at this map of the United States, please tell me the names of three other places in the United States that people might go on a vacation? (HAND MAP - RECORD BELOW UNDER QU.15b IN ORDER MENTIONED) (PROBE:) What other places?

15c) Which places in the United States, if any, have you ever been to? (PROBE:) Any other places? (RECORD UNDER QU.15c - CIRCLE AS MANY AS APPLY. IF RESPONDENT MENTIONS PLACES NOT LISTED UNDER QU.15a OR QU.15b, RECORD BELOW UNDER "OTHER". IF NOT BEEN TO THE UNITED STATES, CIRCLE "X" AND SKIP TO QU.15f)

15d) Which places, if any, have you been to in the past three years, since September, 1984? (RECORD UNDER QU.15d - CIRCLE ALL RESPONSES)

15e) You have named a number of different places in the United States. (READ ALL PLACES MENTIONED - QU.15a, QU.15b AND OTHER) Which one of these places would you be most interested in visiting or re-visiting? (RECORD UNDER QU.15e - MOST)

And which one would be your second choice? (RECORD UNDER QU.15e - 2ND)

And which one would be your third choice? (RECORD UNDER QU.15e - 3RD - TAKE BACK MAP)

6-9 Blank

	Qu.15a	Qu.15c	Qu.15d	Qu.15e		
		Ever been to	Been in past 3 yrs.	Most	2nd	3rd
10-12	1. _____	1-49	1-50	1-52	1-54	1-56
13-15	2. _____	2	2	2	2	2
16-18	3. _____	3	3	3	3	3
19-21	4. _____	4	4	4	4	4
22-24	5. _____	5	5	5	5	5

	Qu.15b					
25-27	1. _____	6	6	6	6	6
28-30	2. _____	7	7	7	7	7
31-33	3. _____	8	8	8	8	8

Never been to United States ------ X → SKIP TO QU.15e

	Other					
34-36	1. _____	1-51	1-53	1-55	1-57	
37-39	2. _____	2	2	2	2	
40-42	3. _____	3	3	3	3	
43-45	4. _____	4	4	4	4	
46-48	5. _____	5	5	5	5	

16a) Overall, how interested are you in visiting or re-visiting the United States in the next five years? Would you say you are ... (READ LIST - CIRCLE ONE)   -58

very interested ------------- 1

somewhat interested --------- 2

Or not interested ------------- 3

16b) I would like you to compare the United States with other overseas places that you have visited on a vacation trip and those you might visit in the future. Even though some people know less about the United States than others do, everyone has impressions of what it would be like to vacation there.

(READ QU.16b AND HAND QUESTIONNAIRE AND PENCIL TO RESPONDENT)

#B123-2

16b) The following is a list of items that might attract people to choose a particular destination for their vacation. For each statement, please "X" one box to show whether you think Canada is (READ SLOWLY) a lot better than other overseas vacation places for that item, a little better than other places, the same as other places, not quite as good or not nearly as good as other places you might vacation. Please start at the item indicated.

Compared with other places Canada is ...

Start here		A lot better	A little better	The same	Not quite as good	Not nearly as good
( )	Variety of things to see and do	( )1	( )2	( )3	( )4	( )5 - 60
	High quality restaurants ------	( )1	( )2	( )3	( )4	( )5
	Value for my vacation money ---	( )1	( )2	( )3	( )4	( )5
	Budget accommodation ----------	( )1	( )2	( )3	( )4	( )5
	Nightlife and entertainment (bars, clubs, dancing) -------	( )1	( )2	( )3	( )4	( )5
	Outstanding scenery -----------	( )1	( )2	( )3	( )4	( )5 - 15
	Shopping ---------------------	( )1	( )2	( )3	( )4	( )5
	Standards of hygiene and cleanliness ------------------	( )1	( )2	( )3	( )4	( )5
	Personal safety, even when travelling alone -------------	( )1	( )2	( )3	( )4	( )5
	Snow skiing (down hill/cross-country) ---------------------	( )1	( )2	( )3	( )4	( )5
	Beaches for swimming and sunning ----------------------	( )1	( )2	( )3	( )4	( )5 - 20
	Local festivals and events ----	( )1	( )2	( )3	( )4	( )5
	Amusement or theme parks ------	( )1	( )2	( )3	( )4	( )5
	Museums and art galleries -----	( )1	( )2	( )3	( )4	( )5
( )	Interesting and friendly local people ---------------------	( )1	( )2	( )3	( )4	( )5
	Outdoor activities such as hiking, climbing -------------	( )1	( )2	( )3	( )4	( )5 - 25
	Public transportation (e.g. airlines, railways, local transit systems) --------------	( )1	( )2	( )3	( )4	( )5
	Live theatre and concerts -----	( )1	( )2	( )3	( )4	( )5
	Unique or different cultural groups such as Eskimo and Indian ---------------------	( )1	( )2	( )3	( )4	( )5
	Inexpensive restaurants -------	( )1	( )2	( )3	( )4	( )5
	National parks and forests ----	( )1	( )2	( )3	( )4	( )5 - 30
	Inexpensive travel to the destination country ----------	( )1	( )2	( )3	( )4	( )5
	Inexpensive travel in the destination country ----------	( )1	( )2	( )3	( )4	( )5
	Fishing -----------------------	( )1	( )2	( )3	( )4	( )5
	Hunting -----------------------	( )1	( )2	( )3	( )4	( )5
	First class hotels ------------	( )1	( )2	( )3	( )4	( )5 - 35
	Spectator sporting events -----	( )1	( )2	( )3	( )4	( )5
	Historical, archeological or military sites and buildings -	( )1	( )2	( )3	( )4	( )5
	Seeing wildlife and birds I don't usually see ------------	( )1	( )2	( )3	( )4	( )5
	Water sports such as surfing, water skiing, sailing, scuba diving -----------------------	( )1	( )2	( )3	( )4	( )5
	Kinds of things I like to do on vacation ------------------	( )1	( )2	( )3	( )4	( )5 - 40

41-77 Blank

78-1
79-0
80-6

#B123-1

16b) The following is a list of items that might attract people to choose a particular destination for their vacation. For each statement, please "X" one box to show whether you think the United States is (READ SLOWLY) a lot better than other overseas vacation places for that item, a little better than other places, the same as other places, not quite as good or not nearly as good as other places you might vacation. Please start at the item indicated.

10 - 40 Blank

Start here		Compared with other places United States is ...				
		A lot better	A little better	The same	Not quite as good	Not nearly as good
( )	Variety of things to see and do	( )1	( )2	( )3	( )4	( )5 - 41
	High quality restaurants ------	( )1	( )2	( )3	( )4	( )5
	Value for my vacation money ---	( )1	( )2	( )3	( )4	( )5
	Budget accommodation ----------	( )1	( )2	( )3	( )4	( )5
	Nightlife and entertainment (bars, clubs, dancing) -------	( )1	( )2	( )3	( )4	( )5
	Outstanding scenery -----------	( )1	( )2	( )3	( )4	( )5 - 46
	Shopping ----------------------	( )1	( )2	( )3	( )4	( )5
	Mountainous areas -------------	( )1	( )2	( )3	( )4	( )5
	Personal safety, even when travelling alone -------------	( )1	( )2	( )3	( )4	( )5
	Snow skiing (down hill/cross- country) --------------------	( )1	( )2	( )3	( )4	( )5
	Fast food restaurants ---------	( )1	( )2	( )3	( )4	( )5 - 51
	Beaches for swimming and sunning ----------------------	( )1	( )2	( )3	( )4	( )5
	Casinos and gambling ----------	( )1	( )2	( )3	( )4	( )5
	Amusement or theme parks ------	( )1	( )2	( )3	( )4	( )5
	Museums and art galleries -----	( )1	( )2	( )3	( )4	( )5
( )	Interesting and friendly local people -----------------------	( )1	( )2	( )3	( )4	( )5 - 56
	Outdoor activities such as hiking, climbing -------------	( )1	( )2	( )3	( )4	( )5
	Availability of package (all-inclusive) vacations ----	( )1	( )2	( )3	( )4	( )5
	Public transportation (e.g. airlines, railways, local transit systems) -------------	( )1	( )2	( )3	( )4	( )5
	Live theatre and concerts -----	( )1	( )2	( )3	( )4	( )5
	Resort areas ------------------	( )1	( )2	( )3	( )4	( )5 - 61
	Inexpensive restaurants -------	( )1	( )2	( )3	( )4	( )5
	Unique or different cultural groups such as Eskimo and Indian -----------------------	( )1	( )2	( )3	( )4	( )5
	National parks and forests ----	( )1	( )2	( )3	( )4	( )5
	Fishing -----------------------	( )1	( )2	( )3	( )4	( )5
	Hunting -----------------------	( )1	( )2	( )3	( )4	( )5 - 66
	First class hotels ------------	( )1	( )2	( )3	( )4	( )5
	Historical, archeological or military sites and buildings -	( )1	( )2	( )3	( )4	( )5
	Opportunities to increase one's knowledge --------------------	( )1	( )2	( )3	( )4	( )5
	Opportunity to escape from the ordinary ---------------------	( )1	( )2	( )3	( )4	( )5
	Water sports such as surfing, water skiing, sailing, scuba diving -----------------------	( )1	( )2	( )3	( )4	( )5 - 71
	Kinds of things I like to do on vacation ------------------	( )1	( )2	( )3	( )4	( )5
	Opportunity for being daring and adventuresome ------------	( )1	( )2	( )3	( )4	( )5 - 73

78-2
79-0
80-6

#8123-21

17a) Now I'd like you to think about places in <u>the United States</u> that people might go
to on a vacation. What are the names of <u>five places in the United States</u> where
people might go on a vacation? (RECORD BELOW UNDER QU.17a IN ORDER MENTIONED)
(PROBE:) What other places in the United States?

17b) Looking at this map of the United States, please tell me the names of three <u>other</u>
places in the United States that people might go on a vacation? (HAND <u>MAP</u> -
RECORD BELOW UNDER QU.17b IN ORDER MENTIONED) (PROBE:) What other places?

17c) Which places in the United States, if any, have you ever been to? (PROBE:) Any
other places? (RECORD UNDER QU.17c - CIRCLE AS MANY AS APPLY. IF RESPONDENT
MENTIONS PLACES NOT LISTED UNDER QU.17a OR QU.17b, RECORD BELOW UNDER "OTHER".
IF NOT BEEN TO THE UNITED STATES, CIRCLE "X" AND SKIP TO QU.17f)

17d) Which places, if any, have you been to in the past three years, since September,
1985? (RECORD UNDER QU.17d - CIRCLE ALL RESPONSES)

17e) You have named a number of different places in the United States. (READ ALL
PLACES MENTIONED - QU.17a, QU.17b AND OTHER) Which <u>one</u> of these places would you
be <u>most</u> interested in visiting or re-visiting? (RECORD UNDER QU.17e - MOST)

And which <u>one</u> would be your <u>second</u> choice? (RECORD UNDER QU.17e - 2nd)

And which <u>one</u> would be your <u>third</u> choice? (RECORD UNDER QU.17e - 3rd - TAKE BACK
MAP)

6-9 Blank

	Qu.17a		Qu.17c	Qu.17d	Qu.17e		
			Ever been to	Been in past 3 yrs.	Most	2nd	3rd
10-12	1. _____		1 ⁻⁴⁹	1 ⁻⁵⁰	1 ⁻⁵²	1 ⁻⁵⁴	1 ⁻⁵⁶
13-15	2. _____		2	2	2	2	2
16-18	3. _____		3	3	3	3	3
19-21	4. _____		4	4	4	4	4
22-24	5. _____		5	5	5	5	5

Qu.17b

25-27	1. _____		6	6	6	6	6
28-30	2. _____		7	7	7	7	7
31-33	3. _____		8	8	8	8	8

Never been to United States ------ X → SKIP TO
QU.17e

Other

34-36	1. _____	1 ⁻⁵¹	1 ⁻⁵³	1 ⁻⁵⁵	1 ⁻⁵⁷
37-39	2. _____	2	2	2	2
40-42	3. _____	3	3	3	3
43-45	4. _____	4	4	4	4
46-48	5. _____	5	5	5	5

18. Overall, how interested are you in visiting or re-visiting the United States in
the next <u>five</u> years? Would you say you are ... (READ LIST - CIRCLE ONE)

very interested ------------- 1 ⁻⁵⁸

somewhat interested --------- 2

<u>Or</u> not interested ------------- 3

#B123-1

17a) Now I'd like you to think about places in <u>Canada</u> that people might go to on a vacation. What are the names of five places in Canada where people might go on a vacation? (RECORD BELOW UNDER QU.17a IN ORDER MENTIONED) (PROBE:) What other places in Canada?

17b) Looking at this map of Canada, please tell me the names of three <u>other places</u> in Canada that people might go on a vacation? (HAND MAP -RECORD BELOW UNDER QU.17b IN ORDER MENTIONED) (PROBE:) What other places?

17c) Which places in Canada, if any, have you ever been to? (PROBE:) Any other places? (RECORD UNDER QU.17c - CIRCLE AS MANY AS APPLY. IF RESPONDENT MENTIONS PLACES NOT LISTED UNDER QU.17a OR QU.17b, RECORD BELOW UNDER "OTHER". IF NOT BEEN TO CANADA, CIRCLE "X" AND SKIP TO QU.17f)

17d) Which places, if any, have you been to in the past three years, since September, 1985? (RECORD UNDER QU.17d - CIRCLE ALL RESPONSES)

17e) Which <u>one</u> thing about Canada would make you recommend it to someone else as a vacation destination? (OPEN ENDED)

6-9

17f) You have named a number of different places in Canada. (READ ALL PLACES MENTIONED - QU.17a, QU.17b AND OTHER) Which <u>one</u> of these places would you be <u>most</u> interested in visiting or re-visiting? (RECORD UNDER QU.17f - MOST)

And which <u>one</u> would be your <u>second</u> choice? (RECORD UNDER QU.17f - 2nd)

And which <u>one</u> would be your <u>third</u> choice? (RECORD UNDER QU.17f - 3rd - TAKE BACK MAP)

	Qu.17a	Qu.17c	Qu.17d	Qu.17f		
			Been in past			
		Ever been to	3 yrs.	Most	2nd	3rd
		-49	-50	-52	-54	-56
10-12	1. _____	1	1	1	1	1
13-15	2. _____	2	2	2	2	2
16-18	3. _____	3	3	3	3	3
19-21	4. _____	4	4	4	4	4
22-24	5. _____	5	5	5	5	5

Qu.17b

25-27	1. _____	6	6	6	6	6
28-30	2. _____	7	7	7	7	7
31-33	3. _____	8	8	8	8	8

Never been to Canada ------------- X → SKIP TO QU.17f

Other

		-51	-53	-55	-57
34-36	1. _____	1	1	1	1
37-39	2. _____	2	2	2	2
40-42	3. _____	3	3	3	3
43-45	4. _____	4	4	4	4
46-48	5. _____	5	5	5	5

18. Overall, how interested are you in visiting or re-visiting Canada in the next <u>five</u> years? Would you say you are ... (READ LIST - CIRCLE ONE)

very interested -------------- 1 -58

somewhat interested --------- 2

<u>Or</u> not interested -------------- 3

#B123-2

59-2
79-0
80-7

19a) Which of these <u>daily</u> newspapers, if any, do you read or look at regularly that is, at least three out of every six issues? (HAND CARD "D" - CIRCLE AS MANY AS APPLY)

-10

Excelsior ------------------------	1
El Universal ---------------------	2
La Prensa ------------------------	3
Novedades ------------------------	4
Ovaciones ------------------------	5
El Nacional ----------------------	6
La Jornada -----------------------	7
El Heraldo de Mexico -------------	8
Uno Mas Uno ----------------------	9
El Sol De Mexico -----------------	0
El Financiero -------------------	X
The News ------------------------	V

-11

El Diario de Guadalajara ---------	1
El Informador -------------------	2
El Jalisciense -------------------	3
Ocho Columnas -------------------	4
El Occidental -------------------	5
El Sol De Guadalajara ------------	6
ABC ------------------------------	7
El Diario De Monterrey -----------	8
Extra ----------------------------	9
El Norte, Edicion El Sol ---------	0

-12

El Norte, Edic. La Silla ---------	1
El Norte, Ed. Las Cumbres --------	2
Magazzine ------------------------	3
Medico ---------------------------	4
El Porvenir ---------------------	5
La Razon -------------------------	6
El Sol ---------------------------	7
Tribuna De Monterrey -------------	8
El Imparcial ---------------------	9
El Sonorense --------------------	0
Diario De Yucatan ----------------	X
Novedades (Yucatan) --------------	V

-13

Tribuna de Yucatan ---------------	1
Diario de Juarez -----------------	2
El Fronterizo -------------------	3
Frontier Business ---------------	4
El Mexicano ---------------------	5
El Universal De Cd. Juarez -------	6

Other (SPECIFY)_____

Do not read daily newspapers ----- X

19b) Which of these weekly periodicals and magazines, if any, do you read or look at regularly, that is, two out of every four issues? (HAND CARD "F" - CIRCLE AS MANY AS APPLY)

-14

Proceso --------------------------	1
Impacto --------------------------	2
Siempre --------------------------	3
Time -----------------------------	4
Revista de Revistas --------------	5
Tiempo Libre --------------------	6
Expansion ------------------------	7
T.V. Novelas --------------------	8

Other (SPECIFY)_____

-15

Do not read weekly periodicals or magazines -------------------- X

#B123-ME

22e) What is your age? (RECORD NUMBER)

☐☐ years
29 30

22f) Are you self-employed?
Yes ----- 1 ⁻³1
No ------ 2

22g) What is your occupation, that is, what kind of work do you do? (WRITE IN)

_____

(NOTE - Codes will be:
Owner ---------------------- 1 ⁻³²
Manager/executive ----------- 2
Professional/technical ------ 3
Clerical/sales -------------- 4
Skilled worker -------------- 5
Unskilled worker ------------ 6
Farming, fishing, forestry -- 7
Military -------------------- 8
Student --------------------- 9
Retired --------------------- 0
Homemaker ------------------- X
Other (SPECIFY) _____ ⁻³³

22h) What is the highest level of education you have completed?
Some/completed elementary school ------ 1 ⁻³⁴
Some/completed junior high school ----- 2
Some/completed technical/commercial --- 3·
Some/completed senior high school ----- 4
Some/completed university ------------ 5

22i) Are you the chief wage earner in your household?
Yes ----- 1 ⁻³⁵
No ------ 2

22j) Which of these categories best describes your total household income before taxes in 1987? Please include all wages, salaries, pensions and income from other sources. Please just tell me the letter from this card. (HAND CARD "D" - CIRCLE ONE ONLY)
⁻³⁶

22k) Can you read, write or speak (French and/or English) or not? (CIRCLE ALL THAT APPLY)

	French	English
Read	1 ⁻³⁷	1 ⁻³⁸
Write	2	2
Speak	3	3
None of these	4	4

22l) RECORD SEX:
Male ---- 1 ⁻³⁹
Female -- 2

REGION
POSTAL CODE

#B123-ME

79-0
80-8

Southern California, Texas, Arizona, or New Mexico

Elsewhere in Mainland United States (including Alaska)

Canada

Europe

Central America

South America

The West Indies/Caribbean

Africa

Near or Middle East (including Saudi Arabia, Israel, etc.)

Asia (e.g. India, Japan, China, Indonesia, Philippines, etc.)

Hawaii, Guam or Samoa

Other South Pacific (e.g. Fiji, Tahiti, etc.)

Australia or New Zealand

Any other country outside Mexico (PLEASE SPECIFY)

CARD "B"

A visit to friends or relatives is a trip whose primary purpose is to visit and spend time with friends or relatives.

A touring trip is a trip by car or bus or train through areas of scenic beauty, cultural or general interest.

A city trip is a trip to a city where you may shop, visit museums, enjoy entertainment, dine, attend plays or concerts, or just stroll around and enjoy the city.

An outdoor trip is a trip in a natural area where you actively take part in such activities as camping, hunting, fishing, hiking or rafting.

A resort trip is a trip to a resort area where a wide variety of activities, such as beaches, skiing, golfing, tennis and so on, are available close by or on the premises.

A trip to an amusement or theme park, exhibition or special event is a trip taken primarily for the purpose of visiting a major theme park or exhibition or special event such as the World Cup, Expo, or Olympic Games.

A cruise is a trip on a cruise ship where you enjoy all the on-board activities and the planned stops at points of interest along the way.

A trip that combines business and pleasure is a trip whose primary purpose is business but you take some extra time for pleasure.

Plane

Train

Bus <u>between</u> cities

Public transportation <u>within</u> cities (e.g. bus, subway, streetcar, etc. but
<u>excluding</u> taxis)

Boat

Rented car

Private car

Camper or recreational vehicle

THE UNITED STATES

OLYMPIC NATIONAL PARK
Seattle
WASHINGTON
Portland
OREGON

GLACIER NATIONAL PARK
MONTANA
CUSTER BATTLEFIELD NATIONAL PARK
IDAHO
YELLOWSTONE NATIONAL PARK
WYOMING
Cheyenne

NORTH DAKOTA
MINNESOTA
Minneapolis
SOUTH DAKOTA
Rapid City
MOUNT RUSHMORE

WISCONSIN
Milwaukee
Chicago
IOWA
Des Moines
NEBRASKA
Omaha

MICHIGAN
Detroit

MAINE
ACADIA NATIONAL PARK
Boston
N.H.
VT.
MASS.
CONN. R.I.
New York City
NEW YORK
Niagara Falls
Newark
INDEPENDENCE NATIONAL PARK
N.J.
DEL.
MD.
PENNSYLVANIA
Philadelphia
Pittsburgh
Baltimore
Wash. D.C.
Richmond
BLUE RIDGE PARKWAY
WEST VA.
VIRGINIA

Cleveland
OHIO
Cincinnati
INDIANA
ILLINOIS
Louisville
MAMMOTH CAVES
KENTUCKY
Nashville
TENNESSEE
Memphis

NORTH CAROLINA
GREAT SMOKY MOUNTAINS NATIONAL PARK
Charleston
SOUTH CAROLINA
GEORGIA
Atlanta
ALABAMA
MISS.

FLORIDA
Tampa
Disney World
Orlando
Miami
EVERGLADES NATIONAL PARK

ROCKY MOUNTAIN NATIONAL PARK
Denver
COLORADO
MESA VERDE NATIONAL PARK
GRAND CANYON NATIONAL PARK
UTAH
Salt Lake City
NEVADA
Reno
LAKE TAHOE
YOSEMITE NATIONAL PARK
Las Vegas
ARIZONA
Phoenix
Tucson
NEW MEXICO
Albuquerque

MISSOURI
St. Louis
Kansas City
KANSAS
OKLAHOMA
Tulsa
Oklahoma City
ARKANSAS
Little Rock
LOUISIANA
New Orleans
Amarillo
Abilene
Fort Worth
Dallas
Houston
San Antonio
TEXAS

MUIR WOODS NATIONAL PARK
San Francisco
Los Angeles
Disneyland
San Diego
CALIFORNIA

GUAM
AMERICAN SAMOA
THE HAWAIIAN ISLANDS
PUERTO RICO
THE VIRGIN ISLANDS

ALASKA
MT McKINLEY NATIONAL PARK

CANADA

YUKON
• Dawson
KLONDIKE NATIONAL
HISTORIC PARK
• Whitehorse
KLUANE
NATIONAL PARK

NORTHWEST TERRITORIES
• Yellowknife

NAHANNI
NATIONAL PARK

BRITISH COLUMBIA

Queen
Charlotte
Islands

PACIFIC RIM
NATIONAL PARK

Vancouver
Island

Victoria •

ALBERTA

JASPER
NATIONAL
PARK •
YOHO
NATIONAL
PARK
• Vancouver

Edmonton
•
BANFF
NATIONAL
PARK
• Calgary

SASKATCHEWAN

PRINCE ALBERT
NATIONAL PARK

Saskatoon
•

Regina •

MANITOBA

LOWER FORT GARRY
NATIONAL HISTORIC PARK

Winnipeg •

LABRADOR

L'ANSE AUX MEADOWS
NATIONAL
HISTORIC PARK

St.
John's

NEWFOUNDLAND

QUEBEC

Gaspe
P.E.I.
NEW
BRUNSWICK
Fredericton
•

CAPE BRETON
ISLAND
• Charlottetown
FORTRESS OF
LOUISBOURG
• Halifax
NOVA SCOTIA
FUNDY
NATIONAL PARK

ONTARIO

Quebec City •

Montreal •

Ottawa •

TRENT-SEVERN WATERWAY

• Niagara Falls

• Toronto

ALGONQUIN
PROVINCIAL
PARK

POINT PELEE
NATIONAL PARK

Thunder
Bay •

CARD "D"

Excelsior
El Universal
La Prensa
Novedades
Ovaciones
El Nacional
La Jornada
El Heraldo de Mexico
Uno Mas Uno
El Sol De Mexico
El Financiero
The News
El Diario de Guadalajara
El Informador
El Jalisciense
Ocho Columnas
El Occidental
El Sol De Guadalajara
ABC
El Diario De Monterrey
Extra
El Norte, Edicion El Sol
El Norte, Edic. La Silla
El Norte, Ed. Las Cumbres
Magazzine
Medico
El Porvenir
La Razon
El Sol
Tribuna De Monterrey
El Imparcial
El Sonorense
Diario De Yucatan
Novedades (Yucatan)
Tribuna de Yucatan
Diario de Juarez
El Fronterizo
Frontier Business
El Mexicano
El Universal De Cd. Juarez
Other (Please specify)
Do not read daily newspapers

CARD "E"

Proceso

Impacto

Siempre

Time

Revista de Revistas

Tiempo Libre

Expansion

T.V. Novelas

Other (Please specify)

Do not read weekly periodicals
or magazines

CARD "F"

Selecciones

Contenido

Mecanica Popular

Geomundo

Hombre De Mundo

Orbita

Vanidades

Tu

Buen Hogar

Activa

Kena

Cosmopolitan

Claudia

Vogue

Other (Please specify)

Do not read magazines

APPENDIX III

DEFINITION OF U.S. 11 CENSUS DIVISIONS

AND 8 TRAVEL REGIONS

8 TRAVEL REGIONS

Travel South

Alabama
Arkansas
Florida
Kentucky
Louisiana
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

Visit U.S. West

Alaska
Arizona
California
Nevada
Oregon
Washington

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Old West Trail Foundation

Montana
Nebraska
North Dakota
South Dakota
Wyoming

America's Heartland

Arkansas
Kansas
Louisiana
Missouri
Oklahoma

Foremost West

Arizona
Colorado
New Mexico
Utah
Wyoming

George Washington Country

Delaware
Maryland
Pennsylvania
Virginia
Washington, D.C.
West Virginia

Great Lakes

Illinois
Indiana
Iowa
Michigan
Minnesota
Ohio
Wisconsin

11 CENSUS DIVISIONS

West North Central

Iowa
Kansas
Minnesota
Missouri
Nebraska
North Dakota
South Dakota

East South Central

Alabama
Kentucky
Mississippi
Tennessee

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

Middle Atlantic

New Jersey
New York
Pennsylvania

East North Central

Illinois
Indiana
Michigan
Ohio
Wisconsin

South Atlantic

Delaware
Washington, D.C.
Florida
Georgia
Maryland
North Carolina
South Carolina
Virginia
West Virginia

West South Central

Arkansas
Louisiana
Oklahoma
Texas

Mountain

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Utah
Wyoming

Pacific

Alaska
California
Oregon
Washington

Pacific Islands

Guam
Hawaii
U.S. Trust Territories

Atlantic Islands

Puerto Rico
U.S. Virgin Islands

APPENDIX IV

95% STATISTICAL CONFIDENCE LEVELS

STATISTICAL TOLERANCES

(Maximum error ranges)

for the 95% level of confidence (two standard errors)

SIZE OF SAMPLE	1% or 99%	2% or 98%	3% or 97%	4% or 96%	5% or 95%	6% or 94%	8% or 92%	10% or 90%	12% or 88%	15% or 85%	20% or 80%	25% or 75%	30% or 70%	35% or 65%	40% or 60%	45% or 55%	50%
											EXPECTED OR OBSERVED PER CENT						
50					6.3	6.9	7.8	8.6	9.3	10.2	11.5	12.5	13.2	13.6	14.1	14.2	14.4
100				3.9	4.4	4.8	5.4	6.0	6.5	7.1	8.0	8.7	9.2	9.5	9.8	9.9	10.0
150			2.8	3.2	3.6	3.9	4.4	4.9	5.3	5.9	6.6	7.1	7.5	7.8	8.0	8.1	8.2
200			2.4	2.8	3.1	3.4	3.8	4.3	4.6	5.1	5.7	6.1	6.5	6.3	7.0	7.0	7.1
250		1.8	2.2	2.5	2.7	3.0	3.4	3.8	4.1	4.5	5.0	5.5	5.8	6.0	6.2	6.2	6.3
300		1.6	2.0	2.3	2.5	2.8	3.1	3.5	3.8	4.1	4.6	5.0	5.3	5.5	5.7	5.8	5.8
400	.99	1.4	1.7	2.0	2.2	2.4	2.7	3.0	3.3	3.6	4.0	4.3	4.6	4.8	4.9	5.0	5.0
500	.89	1.3	1.5	1.8	2.0	2.1	2.4	2.7	2.9	3.2	3.6	3.9	4.1	4.3	4.4	4.5	4.5
600	.81	1.1	1.4	1.6	1.8	2.0	2.2	2.5	2.7	2.9	3.3	3.6	3.8	3.9	4.0	4.1	4.1
800	.69	.98	1.2	1.4	1.5	1.7	1.9	2.1	2.3	2.5	2.8	3.0	3.2	3.3	3.4	3.5	3.5
1,000	.63	.90	1.1	1.3	1.4	1.5	1.7	1.9	2.1	2.3	2.6	2.8	2.9	3.1	3.1	3.2	3.2
1,500	.51	.72	.88	1.0	1.1	1.2	1.4	1.5	1.7	1.8	2.1	2.2	2.4	2.5	2.5	2.6	2.6

Given chance variability of measurement, this table indicates the range of values within which the "true" value of an observed percentage is likely to be found. For instance, given an observed value of 70%, based on a sample size of 250, the "true" value is likely to be in the range of ± 5.8% (i.e. 75.8%-64.2%) 19 out of 20 times.

APPENDIX V

HOW TO INTERPRET A DISCRIMINANT MAP

Note: In the following description of how to interpret a discriminant map, Figure 6 in this report will be used as an example to illustrate some of the points discussed.

The purpose of this discriminant map is to provide a visual summary of the ways in which the segment groups differ from each other. It identifies the extent to which specific attributes differentiate or discriminate the segment groups.

On the map attributes appear as lines radiating from the center of the map whereas segment groups appear as points on the map.

The positions of the groups on the map reflect the differences among them. Basically, groups which are closer together on a discriminant map are more similar to each other than groups which are further apart.

The length and direction of the lines representing the attributes are also an important consideration.

The length of a line is directly proportional to the "discriminating power" of the attribute in question. For example, the attribute "usually buy vacation packages" is represented by a relatively long line because the variation in the ratings of the segment groups on this attribute were quite large. On the other hand, the attribute "do not have to spend a lot of money" is represented by a relatively short line because there was much less variation in the segment group ratings on this attribute.

The direction of the line relative to other lines reflects the degree of association between the attributes in question. For example, the attributes "use travel agent to help decide destination" and "usually buy vacation packages" point in the same direction. Therefore, groups who buy vacation packages are also the ones who use a travel agent to help decide the destination of their trip. Attributes pointing in opposite directions to each other are also highly correlated, except in a negative sense. Attributes which appear at right angles to each other are uncorrelated.

To determine the relative importance of the attributes to each of the groups the positions of the groups relative to the attribute lines are considered. For example, consider an imaginary line on the right side of the map which is perpendicular to the attribute "prefer guided tours". By sweeping this perpendicular to the left through the map (always maintaining its perpendicular orientation) the line initially encounters the points representing the "Budget Package" and Premium Package" groups. Continuing this sweep it then encounters the "Reluctant" and "Independent" groups.

The order in which groups are encountered is important because it gives the rank order of the mean ratings of each group on that particular attribute. With the attribute "prefer guided tours" it is apparent that package travelers would rate this as more important than independent travelers.

When interpreting a discriminant map it should be remembered that the map is only a summary and it therefore does not represent all the information present in the data. Nevertheless, the maps in this report account for at least 77% of the data and are thus a fairly good representation of the group-attribute relationships.

APPENDIX VI

MAP OF MEXICO

MEXICO

- Juarez
- Hermosillo
- Monterrey
- Guadalajara
- Mexico City
- Merida